IDEXX Cornerstone*
Default and Security Settings Guide

8.3

Proprietary Rights Notice

IDEXX Computer Systems

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Table of Contents

Default Settings

Overview

This document outlines the default settings that must be addressed, and in the order which they must be addressed, once the database is loaded. The defaults are located on the Cornerstone* **Lists** and **Controls** menus.

Use this document to make database decisions prior to establishing default settings. To complete the information listed in this guide, you will need to set up and use a staff person login with proper security access.

The sequence of the default settings guide follows this order:

1. Defaults critical to set before the Live Practice (Rekeying) phase of a new installation.
2. Defaults critical to set before the Go Live ph*ase* of a new installation.
3. Remaining defaults that are important for advanced use and owner/manager responsibilities, including defaults critical for Appointment Scheduler setup, if appointments will be rekeyed
4. Defaults important for the Electronic Whiteboard.
5. Defaults important for the Imaging and Laboratory modules.

How the tables in this document are organized

This document uses a table format to present the steps that you need to follow to set up Cornerstone. Here's a key to how these tables are organized:

- Menu Access lists the selections you need to make, starting at the Cornerstone menu bar. For example, **Controls > User Defined Prompts > Client** means to select **Controls** from the menu bar, then select **User Defined Prompts**, and then select **Client**. In some cases, the last selection may be a tab within a window or dialog box.
- Description tells you about the dialog box, window, or window area and what you should do there.
- Action & Decision gives you an at-a-glance description of the action you need to take:

  Set up—You need to specify several pieces of information or set up a number of elements that you will use in the IDEXX Cornerstone Practice Management System.

  Select—You need to set up a specific data element.

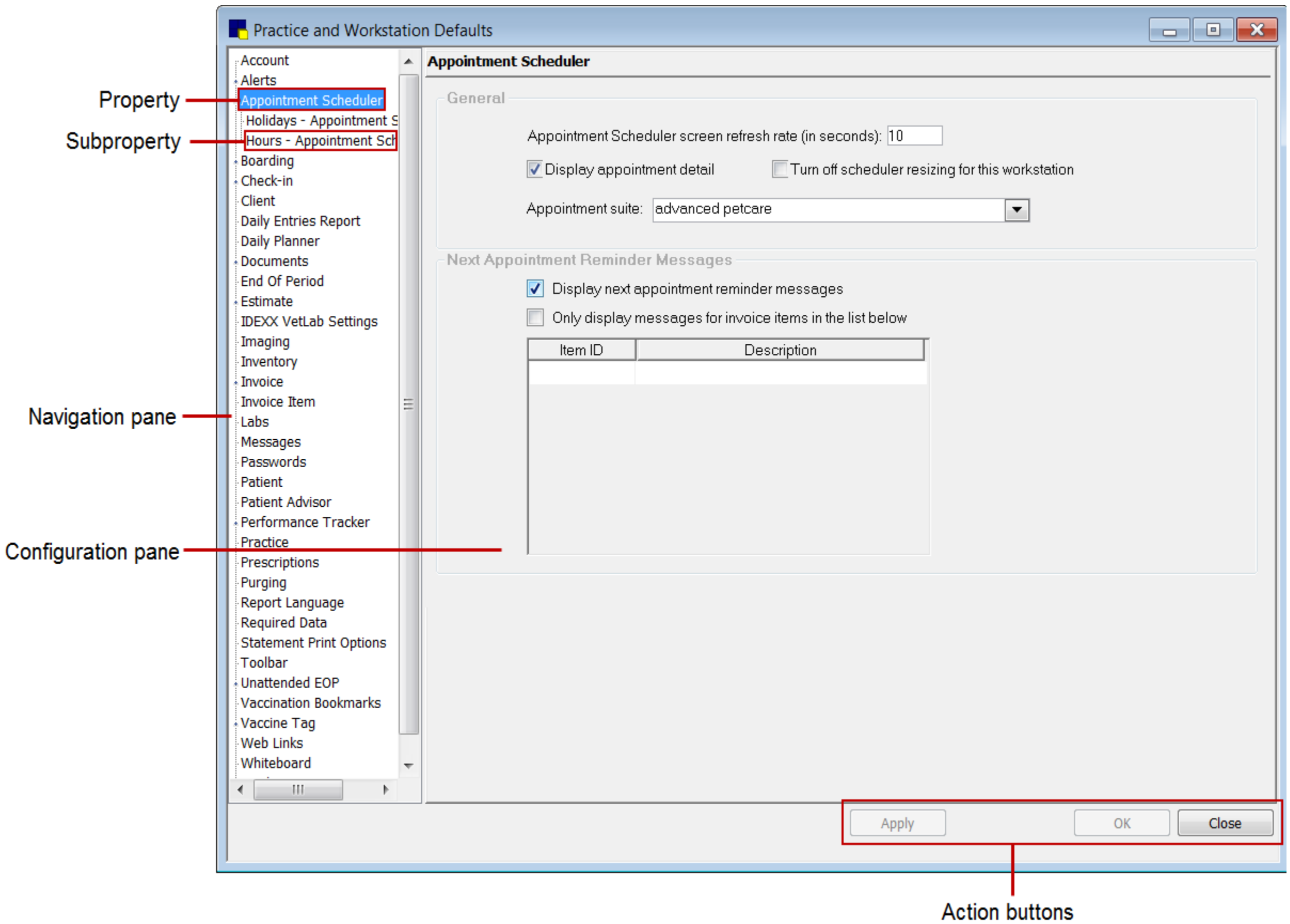
  Verify—A default selection or value is already entered in the database. Evaluate whether this selection/value is appropriate for your practice and edit if needed.

Additional information

- **Cornerstone Administrator's Manual**— Find reference information and procedural steps for setup and system configuration in Cornerstone. A shortcut icon is located on your desktop.
- **Cornerstone User's Manual**— Find reference information and procedural steps for using Cornerstone to perform daily tasks. An icon is located on your desktop.
- **Cornerstone Help**—Additional information about all of windows in Cornerstone is available in the Help. With the window open, press F1 to open the applicable Help topic.
- **Snippet videos**—When you see the snippet video icon, a short "how-to" video is available. Go to idexxlearningcenter.com, click **On-Demand Learning**, and click the **Snippets** tab.

Practice and Workstation Defaults Window

This window simplifies your initial Cornerstone setup and saves you time when looking for a particular default setting. A large number of default settings are made on this window.

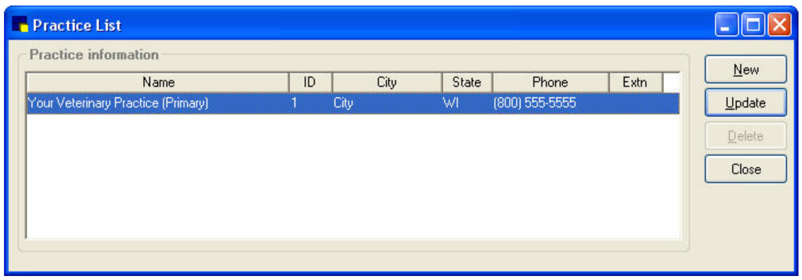
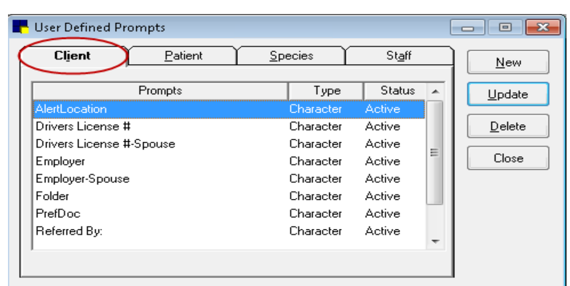


Accessing Practice and Workstation Defaults

1. Select **Controls > Defaults > Practice and Workstation**.
2. The left-side navigation pane lists the available properties that you can configure. A plus sign **[+]** box to the left of a property indicates that it has one or more associated subproperties; click the **[+]** box (or the property) to expand its list of subproperties. Select the property or sub-property to configure. The corresponding configuration pane displays on the right.
3. Depending on your actions, the following buttons may display on the bottom of the Practice and Workstation Defaults window:
   - **Apply**—Applies any changes made since the last time **Apply** was clicked and leaves the Practice and Workstation Defaults window open so you can continue viewing/changing additional properties as needed.
   - **OK**—Applies any changes and closes the Practice and Workstation Defaults window.
   - **Cancel**—If any changes have been made, you are prompted to save the changes, and then the Practice and Workstation Defaults window is closed. (Any previous changes that were applied using the **Apply** button are retained, not cancelled.)
   - **Close**—Closes the Practice and Workstation Defaults window (displays in place of the **Cancel** button if no changes have been made or if changes have been applied).

Critical Live Practice Data (Rekeying) Default Settings

The following default settings are critical to the Live Practice Data (Rekeying) phase of the installation:

Menu Access	Description	Action & Decision
Lists > Practice	**Practice List window** Verify that all the practice information is correct. The first phone number is the number that will print on plain paper estimates, invoices, statements, and prescription labels. 	**Verify**
Controls > User Defined Prompts > Client Prompts	**User Defined Prompts window—Client tab** Prompts allow you to customize Cornerstone to store information that is gathered for a new client. A client prompt can be set as an alert to bring certain information to the attention of your staff. You can further customize alerts by assigning them a color. It is also possible to require that certain information be put into Cornerstone for every client. **Note:** You should never store sensitive client data, such as credit card numbers or Social Security numbers, in Cornerstone. If you want to use Cornerstone to process payments in a manner that is PCI PA-DSS (Payment Credit Industry Payment Application Data Security Standard) certified, be sure to use one of our approved Cornerstone payment processing integrations. These fields can be set up to let staff type the information (characters and numbers) needed. They can also be set up as yes/no fields that allow staff to choose an answer. In addition, these fields can include custom-designed lists that limit the information staff places within the field. C=Character; N=Number; Y/N=Yes/No; L=List Used in the following manner throughout Cornerstone: • Client Prompts Report • List data types appear in the **Answer** field (**Lists > Clients > New or Update button > Client Information window > Prompts/Notes tab**) as list selections. • When a prompt is set up as an alert, the alert will show on the Patient Clipboard*, on the Appointment Scheduler, at check-in, on an invoice, and on an estimate. 	**Set up**

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Controls > User Defined Prompts > Patient Prompts</td><td>

User Defined Prompts window—Patient tab

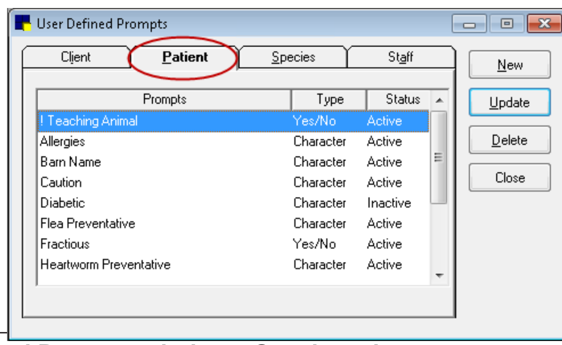
Like the client prompts, patient prompts allow you to create fields to record customized information about a patient on the **Prompts/Notes** tab. These prompts can also have alerts assigned to bring this information to the attention of your staff.

Note: You should never store sensitive client data, such as credit card numbers or Social Security numbers, in Cornerstone. If you want to use Cornerstone to process payments in a manner that is PCI PA-DSS (Payment Credit Industry Payment Application Data Security Standard) certified, be sure to use one of our approved Cornerstone payment processing integrations.

C=Character; N=Number; Y/N=Yes/No; L=List

Used in the following manner throughout Cornerstone:

- Check-in Report
- Data types appear in the **Answer** field (**List > Patients > New** or **Update** button **> Patient Information** window **> Prompts/Notes** tab) as list selections.
- When a prompt is set up as an alert, the alert displays on the Patient Clipboard, on the Appointment Scheduler, at check-in, on an invoice, on an estimate, and on patient orders. They do not display on the Patient Clipboard. It is optional to display prompts/ alerts on the Patient Clipboard, select the **Alerts** tab.



</td><td>Set up</td></tr>
<tr><td>Controls > User Defined Prompts > Species Prompts</td><td>

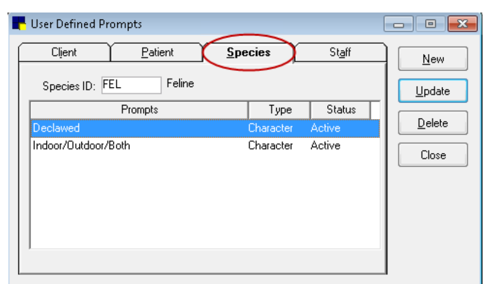
User Defined Prompts window—Species tab

Species prompts show only when a patient is set up under the species with the designated prompts. These prompts cannot be set as alerts.

C=Character; N=Number; Y/N=Yes/No; L=List

Used in the following manner and in the following places in Cornerstone:

- Initial Patient Setup Report by species
- Data types appear in the **Answer** field (**List > Patients > New or Update button > Patient Information window > Prompts/ Notes tab**) as list selections..



</td><td>Set up</td></tr>
</table>

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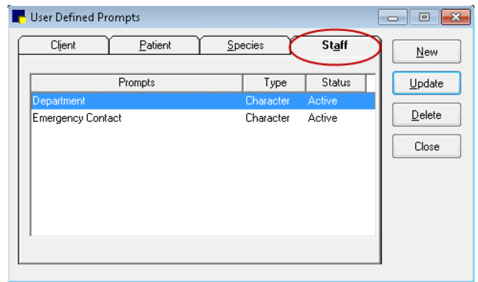
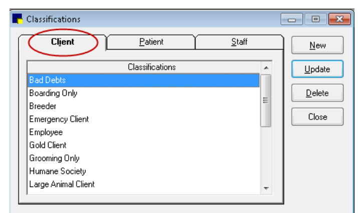
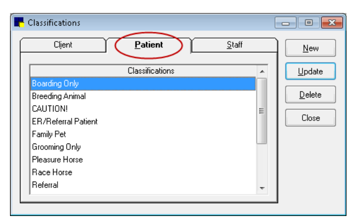
Menu Access	Description	Action & Decision
Controls > User Defined Prompts > Staff Prompts	**User Defined Prompts window—Staff tab** Staff prompts are for tracking detailed information about your staff. This information can be secured. These prompts cannot be set as alerts or required fields. C=Character; N=Number; Y/N=Yes/No; L=List Used in the following manner throughout Cornerstone: • Initial Staff Setup Report • Staff Defined Prompts Report 	**Set up**
Controls > Classifications > Clients	**Classifications window—Client tab** Client classifications allow you to sort lists and print reports by a specific classification. These classifications can be set up as alerts. Client classifications can also be used to determine whether that client type will receive reminders and/or statements. Used in the following manner throughout Cornerstone: • Client Master Report • Initial Client Setup Report • Client Information window • **Activities > Generate Reminders** 	**Set up**
Controls > Classifications > Patient	**Classifications window—Patient tab** Patient classifications allow you to sort lists and print reports by a specific classification. These classifications can be set up as alerts. Patient classifications can also be used to classify your patient types and manage data and criteria when using the Compliance Assessment Tool*. Used in the following manner throughout Cornerstone: • Client Master Report • Initial Client Setup Report • Client Information window • **Activities > Generate Reminders** 	**Set up**

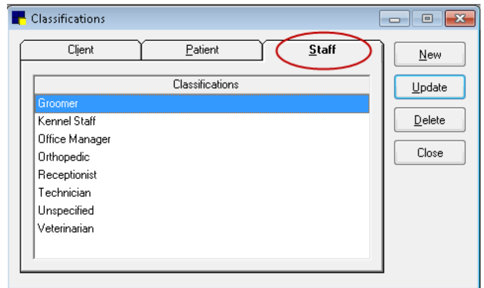
<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Controls > Classifications > Staff</td><td>

Classifications window—Staff tab

Staff classifications are used for printing a staff report sorted by classification and is used for performance tracker report, including number of transactions, average transactions, and gross sales.

Used in the following manner throughout Cornerstone:

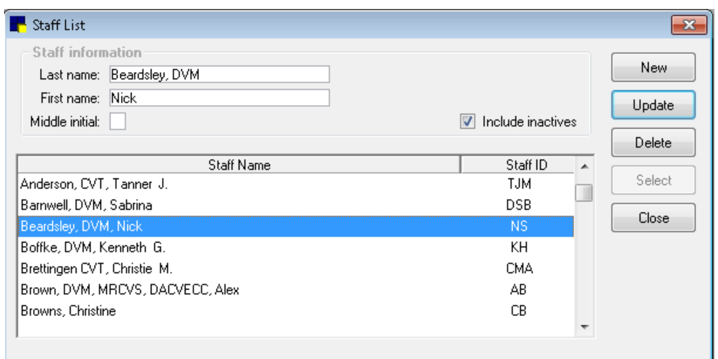
- Staff Class Commission % Report
- Staff Commission % Report
- Staff Defined Prompts Report
- Staff Summary Report
- End of Month Reports—YTD Net Sales Reports
- Time Clock Report



</td><td>Set up</td></tr>
<tr><td>Lists > Staff</td><td>

Staff List window

This Staff List contains various staff member names, dependent on how the staff members log into Cornerstone and what functions they perform. Each staff member is required to have a staff ID and a user name.

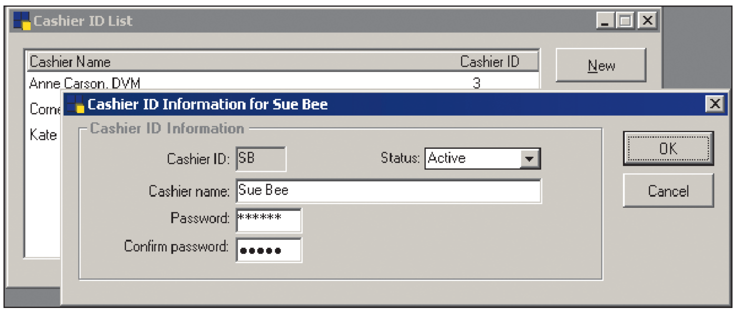
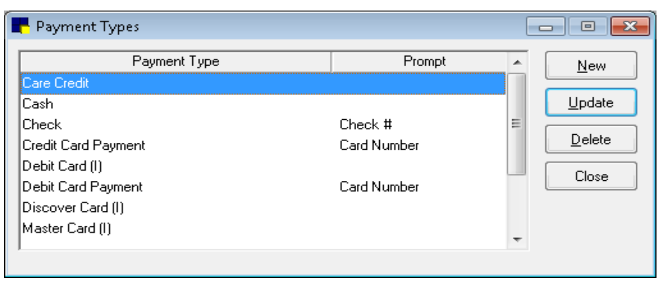


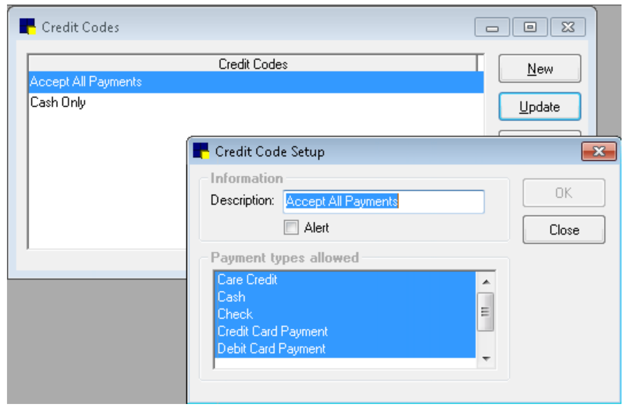
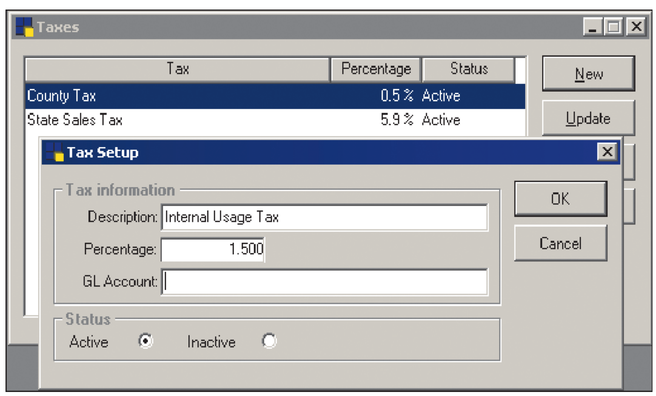
This list includes each staff member who will have a password and security to use the system. It also contains a user name for anyone who will invoice a client (receptionist ID) and anyone who will use the Time Clock feature (this requires a password).

Each item on an invoice is assigned to a staff member. Any staff member whose ID is associated with these items is also included in the list.

Other information can also be stored in this area (prompts, notes, and signatures). How staff should log into Cornerstone should be determined before setting up staff information.

</td><td>Set up/Verify</td></tr>
</table>

Menu Access	Description	Action & Decision
Lists > Cashier ID	**Cashier ID List window** Cashier IDs are used to record the staff member who accepts payment. The cashier ID feature must be activated (**Controls > Defaults > Practice and Workstation > Account**) before the list can be created. Used in the following manner throughout Cornerstone: • Requires entry of cashier password on payment screen • End of Day Reports—Daily Deposit Report • End of Day Reports—Daily Payment Register by Cashier by ID • End of Day Reports—Daily Payment Register by Cashier by Payment Type • End of Month—Monthly Deposit Report 	**Set up**
Controls > Payment Types	**Payment Types window** Payment types separate daily deposit reports into various forms of payment so that the cash drawer can be verified. These payment types can also be assigned to credit codes restricting Cornerstone's ability to accept a particular payment type with certain credit codes (e.g., cash only clients cannot pay with a check). Used in the following manner throughout Cornerstone: • Can be grouped together for client payment categories • End of Day Report: Daily Payment Register—By Payment Type • End of Day Report: Daily Payment Register—By Cashier by Payment Type • End of Day Report: Daily Audit Trail Report, no payment type totals 	**Verify**

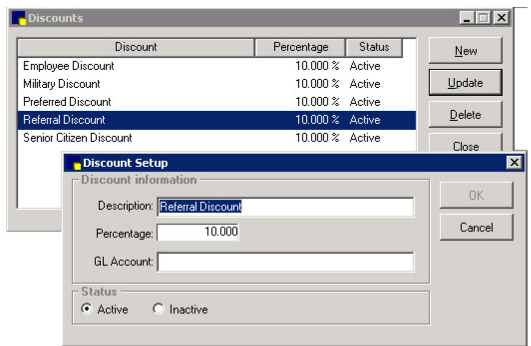
Menu Access	Description	Action & Decision
Controls > Credit Codes	**Credit Codes window** Credit codes are used to control the types of payments that are accepted from clients. Each credit code is tied to the various forms of payment (**Controls > Payment Types**) that are allowed for that client. If a payment type is not allowed, staff will not be able to accept that type of payment from a client. Payment types can be set as alerts. Used through Cornerstone in the following manner: • Used to group types of payments that can be received from clients • Client A/R Information Report 	**Verify**
Controls > Taxes	**Taxes window** Taxes are assigned to services and inventory to allow Cornerstone to print tax reports necessary for your business. If you pay different taxes to different agencies, these taxes should be set up independently. If all taxes collected go to a single agency, a single tax type may be all that is necessary. Used in the following manner throughout Cornerstone: • Selected in the Invoice Item Setup window • End of Day Report: Daily Revenue Report (totals for each type of text) 	**Set up**

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Controls > Discounts</td><td>
Discounts window

The Discounts window is used to assign both automatic and line item discounts to clients. For automatic discounts, it is necessary to assign the discounts to both service/inventory items and to clients. To use these discounts by line item, choose them from the list.

Used in the following manner throughout Cornerstone:

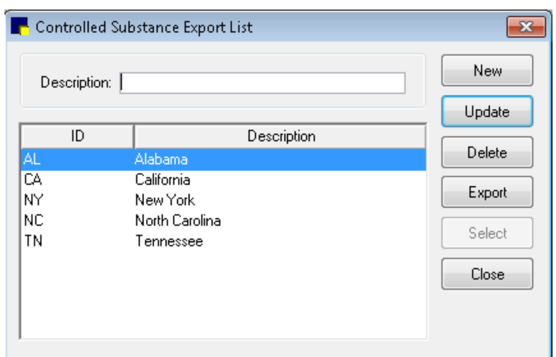
- On the Estimate and Client Invoice windows
- Can be selected in the Client Information window
- Can be selected in the Invoice Item Information window



</td><td>Set up</td></tr>
<tr><td>Controls > Controlled Substance > Controlled Substance Export</td><td>
Controlled Substance Export List window

Some states' controlled substance filing forms have been pre-defined and can be selected from the Controlled Substance Export List. If your state does not appear on this list, you have the option to create an electronic filing form that is compatible with your state's requirements.

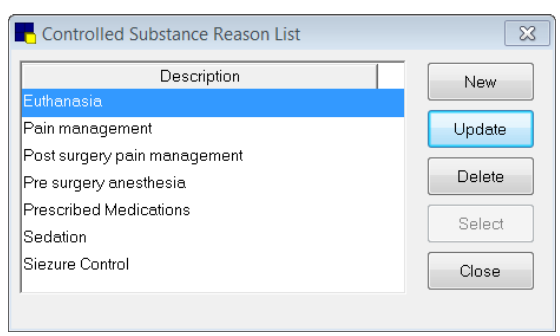
Note: To obtain a list of required data, contact your state's controlled substance agency.



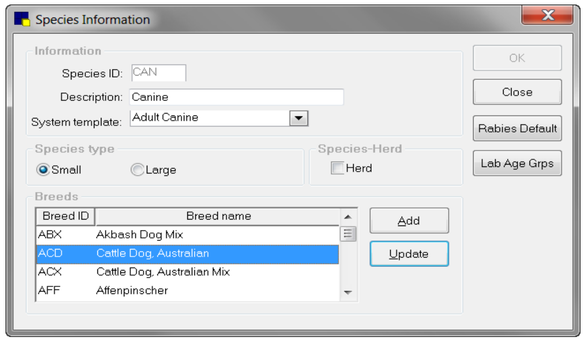
</td><td>Set up</td></tr>
<tr><td>Controls > Controlled Substance > Controlled Substance Reasons</td><td>
Controlled Substance Reasons window

Some states require practices to document the reason a controlled substance was used or dispensed. Cornerstone allows you to set up a list of reasons for the use of a controlled substance. Some common reasons are loaded with your software.

To enable the use of controlled substance reasons, select the Use controlled substance reasons check box in Controls > Practice and Workstation Defaults > Invoice.



</td><td>Set up</td></tr>
</table>

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr>
<td>Lists > Species
(Breeds are set up within each species)</td>
<td>
Species Information window
Set up species for each type of patient. The following options must be determined:
<table>
<tr><th>Option</th><th>Description</th><td rowspan="3">
</td></tr>
<tr><td>Species type</td><td>Small or Large</td></tr>
<tr><td>Species-Herd</td><td>If this species is used for herd records (for example, bovine), select the Herd check box. This option prevents weight, birth date, and patient born information in alerts from displaying on herd records.</td></tr>
<tr><td>Lab Age Groups</td><td colspan="2">Lab results that cannot be automatically downloaded into Cornerstone can be entered manually. Click the Lab Age Grps button to set up age groups that can be used for manual Lab Results.</td></tr>
<tr><td>Species Specific Rabies Tag</td><td colspan="2">Practices that set up their vaccine/vaccination invoice items prior to Cornerstone 8.1 may have a service-based system in place, where items are set up as vaccination service items (with no links to vaccine inventory items). Click the Rabies Default button to open the Species Specific Rabies Tag window. For more information, with the window open, press F1 to view the online Help.</td></tr>
</table>
Used in the following manner throughout Cornerstone:

Assigned in Patient Information window
Statistics by Species—Closed Invoices Report
Activities > Generate Reminders

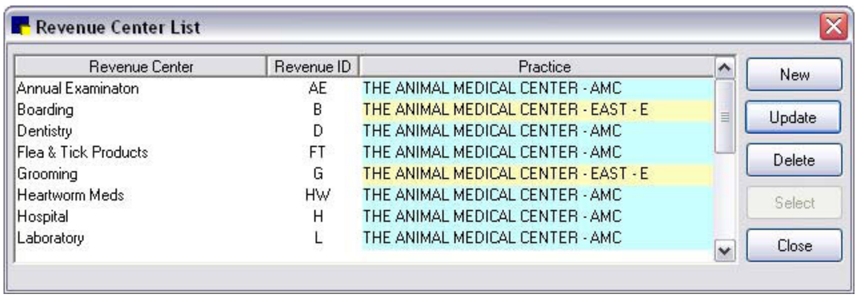
</td>
<td>Verify</td>
</tr>
</table>

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Lists > Revenue Center</td><td>
Revenue Center List window

Revenue centers are used to sort various reports and allow for tracking of sales based on broad categories. Revenue centers can be defaulted by item, item classification, and/or staff members.

Used in the following manner throughout Cornerstone:

• During invoicing, to determine which revenue center should receive the sale
• Allows Cornerstone the ability to track “departmental” revenue centers
• Multiple sales reports



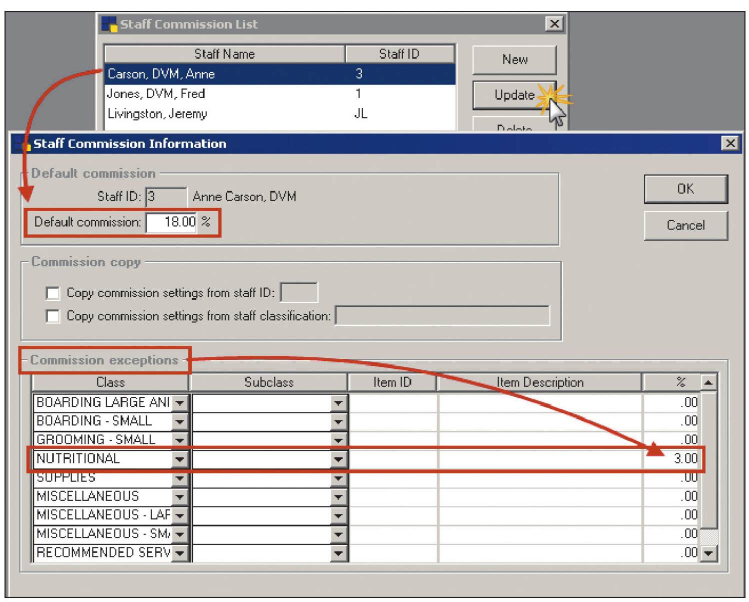
</td><td>Set up</td></tr>
<tr><td>Lists > Staff Classification Commission</td><td>
Staff Commission List window

You can set up commission percents for staff members or for an entire staff classification (for example, all groomers). Percents can be set up by invoice item classification, subclass, or invoice item. Staff commissions are based on sales totals, not receipts.
</td><td>Set up</td></tr>
<tr><td>Lists > Staff Commission</td><td>
Staff Commission Information window

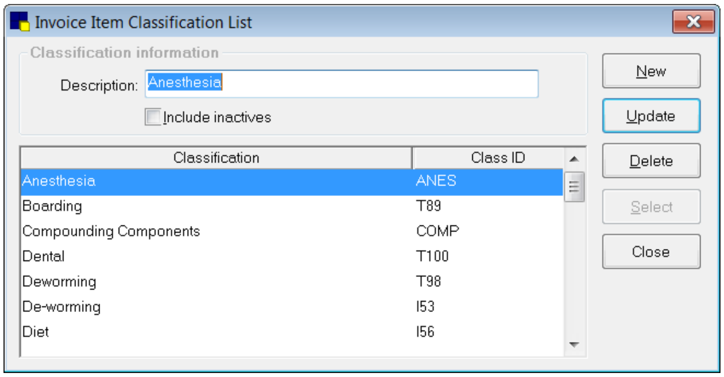
The Staff Commission Information window provides the ability to set up staff commission percentage by staff classification or by individual staff members.

This window is used only if staff is paid by commission. Commissions can be assigned to broad categories or specific items with exceptions for special situations/sales.

• Used in End of Day and End of Month staff commission reports



</td><td>Set up</td></tr>
</table>

Menu Access	Description	Action & Decision
Lists > Invoice Item Class	**Invoice Item Classification List window** Classify invoice items to generate more specific information in reports, mark up or mark down entire groups of similar invoice items, and narrow invoice item searches. 	**Set up**
Controls > Invoice Types	**Invoice Types window** You can select an invoice type for each invoice. Invoice types allow you to analyze the productivity of different areas of your practice. You can also use invoice types to prevent certain invoices (such as boarding) from closing at the end of the month.	**Set up**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Account *See figure A*	Payment type	Select a default payment type to appear when a client makes a payment, if desired.	**Select**
	Calculate change given	Select this check box to automatically calculate the amount of change to give to the client (after receiving a payment). If you do not select this option, you must manually type the amount you return to the client.	**Select**
	Print heading	Select this check the box to print the practice name and address on your statements if you are using plain paper.	**Select**
	Copies	Enter the default number of payment copies you want to print.	**Select**
	Adjustment comment	Enter a default adjustment comment that will display when you make an adjustment to an account.	**Set up**
	Use Cashier ID	Select this check box to track which staff members accept payments. This allows the practice administrator to track who is taking payments. It will require staff to enter a cashier password when taking/correcting payments. This information can be located in several reports. Originates from **Lists > Cashier ID**.	**Set up**
	Service charge	Enter the service charge amount for a returned check. This charge is applied automatically when performing the returned check function. This feature can be overridden if needed.	**Set up**
Client *See figure B*	Client ID	This is the starting client ID number. Cornerstone will automatically start the client ID numbering sequence from the number entered in the **Client ID** box. Suggestion: Start at 1000 so that the clients have 4-digit client IDs.	**Set up**
	Auto assign	Select this check box to have Cornerstone automatically assign client IDs.	**Select**
	Classification	Select a classification to save keystrokes when entering a new client by automatically assigning new clients to a default classification. This default can be changed as needed when entering a client. Originates from **Controls > Classifications**. Used in the following manner throughout Cornerstone: • Client Setup window, default classification	**Select**
	Postal code	Enter a ZIP Code/postal code to save keystrokes when entering a new client by automatically completing a postal code, city, and state. This default can be changed as needed when entering a client. Originates from **Lists > Postal Codes**. Used in the following manner throughout Cornerstone: • Client Setup window, default postal code	**Verify**
	Area/City code	Enter a phone area/city code to save keystrokes when entering a new client by automatically completing the information. This default can be changed as needed when entering a new client. Used in the following manner throughout Cornerstone: • Client Setup window, default area/city code	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Client *See figure B (continued)*	Recently accessed clients	Enter the number of recently accessed clients to be available on any given workstation (e.g., front desk, reception). To view this list of clients, press F7 (back) and F8 (forward) in the Client List window.	**Verify**
	Use most recent client	Select this check box to display the client whose record was last opened at any given workstation when you access client search, estimates, invoices, client correspondence, prescriptions, lab requests, and client account.	**Verify**
	Credit code	A credit code is required by the Cornerstone software when entering a new client. To save keystrokes when entering a new client, select a default credit code. Generally, the credit code is defaulted to one that allows all kinds of payments (e.g., cash/check/credit card). Originates from **Controls > Credit Codes**. Used in the following manner throughout Cornerstone: • Client Setup window, default credit code	**Verify**
	Billing charge	Select this check box if you want new clients to automatically be assessed a billing charge when carrying a balance and receiving a printed statement. The selection can be changed in individual client accounts. Billing charges are applied each time statements are printed.	**Select**
	Finance charge	Select this check box if you want new clients to automatically be assessed a finance charge for carrying a balance. The selection can be changed in individual client accounts. The End of Month reporting process will assess finance charges. Be sure your state laws allow you to assess finance charges.	**Select**
	Tax Exempt	Select this check box if you want new clients to automatically be designated with tax-exempt status. The selection can be changed in individual client accounts. Be sure you understand and comply with state laws regulating tax payments and collections.	**Select**
	Show client balances on trainer reminder reports	Select this check box if you want the account balance to print on the Trainer Reminder Report. This is usually used in equine practices.	**Select**
	Omit voided invoices and payments on statements	Select this check box so that users do not have to select the **Omit voided invoices and payments on statements** check box on the Monthly Statement window each time statements are run. Users can clear the check box when statements are printed. Originates from **Reports > End of Period > End of Month > Monthly Invoices and Statements**.	**Verify**

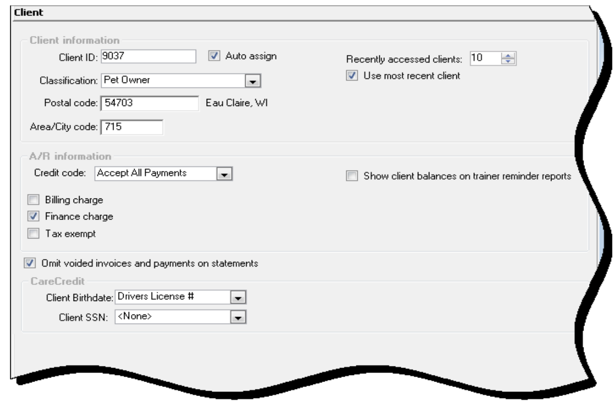
Controls > Defaults > Practice and Workstation

Figure A

(Controls > Defaults > Practice and Workstation > Account)

Figure B

(Controls > Defaults > Practice and Workstation > Client)



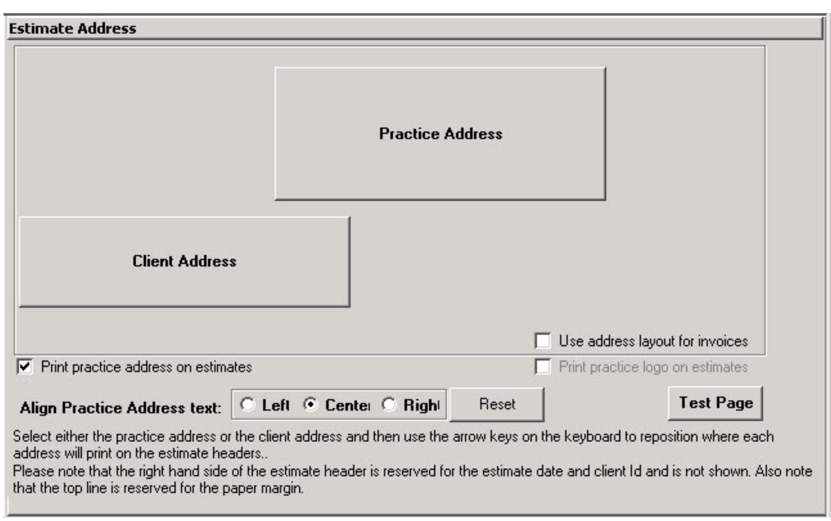
Menu Access	Default	Description	Action & Decision
Estimate *See figure C*	Staff ID	Enter the staff ID to appear on new estimates.	**Verify**
	Number of days to store unsigned estimates	Both finalized and tentative unsigned estimates will remain in the system the number of days selected and then will disappear. If an estimate is finalized and a patient visit list is created, that list will not be removed until the items are either invoiced or deleted. This option is only a default setting when saving and can be overridden when saving an estimate.	**Verify**
	Finalize estimate	Select this check box to default an estimate's status to final when saving estimates. When creating an estimate, you have the option of changing the selection of the finalize estimate check box. Finalizing an estimate means that no changes can be made to its contents. Finalizing also creates a Patient Visit List entry for the charges listed.	**Verify**
	Transfer to Patient Visit List when finalized	**Low prices** Select this option to transfer the low prices from an estimate to the Patient Visit List. **High prices** Select this option to transfer the high prices from an estimate to the Patient Visit List. **Add invoice items to PVL** Set a practice-wide default specifying if invoice items should automatically be added to the Patient Visit List from a finalized estimate.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Estimate *See figure C (continued)*	Estimate print	# copies: Enter the number of estimate copies you want to print. This option is a default setting only when the user can override printing when printing an estimate. Print staff name: Select this check box to print the staff name on estimates. The name will print as it displays in the Staff List window. Print item ID: Select this check box to print invoice item IDs on estimates. Use authorizing signature: Select this check box if you want the option to have clients provide electronic signatures on estimates. This setting also determines which option is selected by default on the Save Estimate dialog box—**Preview/Signature** (if check box is selected) or **Save and continue** (if check box is not selected). Use witness signature: Select this check box if you want the option to capture an electronic witness signature; a witness signature line is added to the estimate. Preview before printing: This check box is enabled if the **Use authorizing signature** check box is cleared. Select this check box to allow the Print Preview window for estimates to appear before printing an estimate. With the Print Preview window, you can complete the following estimate processing tasks in a single window: • View the estimate at different zoom levels. • Specify the number of days to keep an unsigned estimate (signed estimates are automatically finalized and saved to patient history). • Finalize an estimate. • Print an estimate. • Email an estimate. • Obtain an electronic signature and optional witness signature on an estimate (requires a connected signature capture device or a tablet PC).	**Verify**
	Estimate print	**Print prices**–Only low prices: Select this option to print only the low prices on the estimate. **Print prices**–Only high prices: Select this option to print only the high prices on the estimate. **Print prices**–Both low and high prices: Select this option to print both high and low prices on the estimate. **Print**–Both detail and total: Select this option to print the estimate detail and total. **Print**–Only total: Select this option to print only the estimate total	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Estimate *See figure C (continued)*	Estimate message	Combine multiple estimate messages to use as the default message that prints on the estimate. Estimate messages can be changed as estimates are created. Originates from **Controls > Estimate Messages**.	**Set up**
	Print estimate messages on separate page	Select this check box to print all estimate messages on a separate page from the invoice, usually following the last printed page of the invoice.	**Verify**
Estimate > Estimate Address *See figure C-1*	Client Address	To adjust the placement of the client address on the estimate when using window envelopes, click the **Client Address** box and use the arrow keys on your keyboard to adjust the location.	**Verify**
	Print practice address on estimates	Select this check box to print the practice address on estimates. If you are using letterhead or preprinted paper, clear the check box.	**Verify**
	Practice Address	To adjust the placement of the practice address on the invoice when using window envelopes, click the **Practice Address** box and use the arrow keys on your keyboard to adjust the location.	
	Align Practice Address text	Select an alignment option for the practice address text on estimates.	**Verify**
	Reset	Click the **Reset** button to reset the alignment for address text.	**Verify**
	Use address layout for invoices	Select this check box to use this address layout for invoices.	**Verify**
	Print practice logo on estimates	Select this check box to print the practice logo on estimates.	**Verify**
	Test Page	Click the **Test Page** button to print a test page.	**Verify**

Figure C-1

(Controls > Defaults > Practice and Workstation > Estimate > Estimate Address



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Invoice *See figure D*	Staff ID	Enter the staff ID to appear by default on a new invoice. If you have multiple staff members, it may be best not to default to a staff member. Not selecting a default staff ID will require staff to choose the appropriate provider at the time of invoicing.	**Verify**
	Invoice type	Select the invoice type to appear by default on a new invoice.	**Verify**
	Display patient visit message	Clear the **Display patient visit message** check box if you want the Patient Visit List window to automatically appear when items exist on the Patient Visit List for any patient belonging to the client that you're invoicing. If this option is selected, a message will display, asking if you want to select items from the list.	**Verify**
	Automatically mark patient as deceased	Select this check box to automatically change a patient's status to Deceased when they are invoiced for an item with the Mark as Deceased special action.	**Verify**
	Apply group item pricing before dispensing fee and minimum price	Select this check box if your practice gives discounts on invoice item groups and you want to exclude dispensing fees from the discount. This can be changed per item later if necessary.	**Select**
	Prompt for call back note	Select this check box to display a callback note during invoicing. This option will allow staff to enter specific callback information at the time of invoicing so it is available to the staff making the call at a later time. The invoice item must be set to generate a callback reminder.	**Verify**
	Display below reorder point warning	Clear this check box to prevent an alert box from displaying when an item that is below the reorder point is placed on an invoice.	**Verify**
	Omit duplicate special action documents	Select this check box to prevent duplicate documents from printing.	**Verify**
	Use controlled substance reasons	Select this check box to allow the display of items from the Controlled Substance Reason List on invoices. Items must be marked as a controlled substance for this feature to work. Originates from **Controls > Controlled Substance > Controlled Substance Reasons**.	**Verify**

<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="3">Invoice
See figure D (continued)</td><td>Invoice print</td><td>
<table>
<tr><td>Print heading</td><td>Clear this check box if you do not want your practice information to appear at the top of invoices.
This is usually done if you are using letterhead or pre-printed paper instead of plain paper for printing invoices or estimates.
Originates from Lists > Practice.</td></tr>
<tr><td># copies</td><td>Enter the number of invoice copies you want to print.</td></tr>
<tr><td>Print staff name</td><td>Select this check box to print the provider name on invoices. The name will print as it displays in the Staff List window.</td></tr>
<tr><td>Print patient reminders</td><td>Select this check box if you want patient reminders to print on the invoice.</td></tr>
<tr><td>Number of months to print appointments for</td><td>Enter the number of months to include for printing future appointments for a client's active patients on the bottom of invoices.</td></tr>
<tr><td>Turn on invoice receipt options</td><td>Select this check box to allow the user to print 3 1/8" receipts instead of full-page invoices. The receipt does not include client information and does not list invoices items by patient. This option requires an Epson® TM-T88IV receipt printer.</td></tr>
</table>
</td><td>Verify</td></tr>
<tr><td>Calculate accounts receivable by provider</td><td>If you pay your providers based on collected accounts receivable, select this check box. If you do not pay your providers this way, do not activate this option.
<table>
<tr><th colspan="2">Use this feature if:</th></tr>
<tr><td>Doctors are paid by commission</td><td>If yes, how much?</td></tr>
<tr><td>Doctors are paid only by production
Doctors are paid by money received on production?</td><td>The percentage the doctor earns on the money received on production.</td></tr>
</table>
</td><td>Verify</td></tr>
<tr><td>Apply payment to specific invoices for A/R by provider</td><td>Select this check box to always apply payments received to a specific invoice. We recommend that this check box not be selected. Then, the payment on the invoice will be applied to the oldest balance first. Unless you selected the previous option (Calculate accounts receivable by provider), skip this option. You must select this option if you want to print an A/R report by provider as part of your End of Month.</td><td>Select</td></tr>
</table>

Controls > Defaults > Practice and Workstation

Menu Access	Default	Description		Action & Decision
Invoice *See figure D (continued)*	Patient Visit List	Include recommended	Select this check box if you want items with a Recommended status to be automatically selected to transfer to an invoice and to be included in the total displayed on the Patient Visit List.	**Select**
		Include accepted	Select this check box if you want items with an Accepted status to be automatically selected to transfer to an invoice and to be included in the total displayed on the Patient Visit List.	
		Include performed	Select this check box if you want items with a Performed status to be automatically selected to transfer to an invoice and to be included in the total displayed on the Patient Visit List.	
		Display blue comment line	Select this check box if you want the blue comment lines to appear on the Patient Visit List.	
		Display duplicate items warning	Clear this check box if you do not want this warning window to appear. The items will still show in a maroon color.	

Figure C

(Controls > Defaults > Practice and Workstation > Estimate)

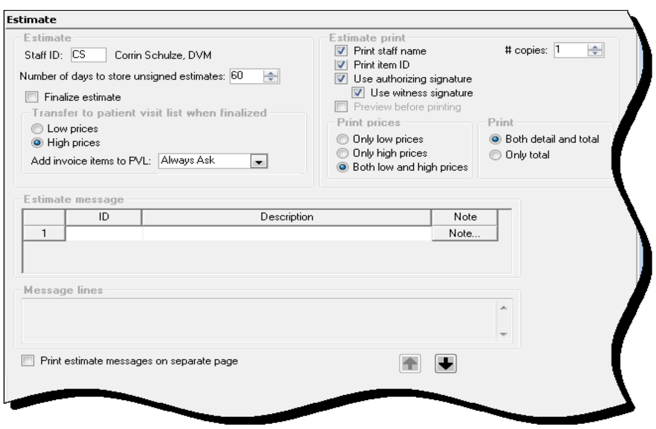
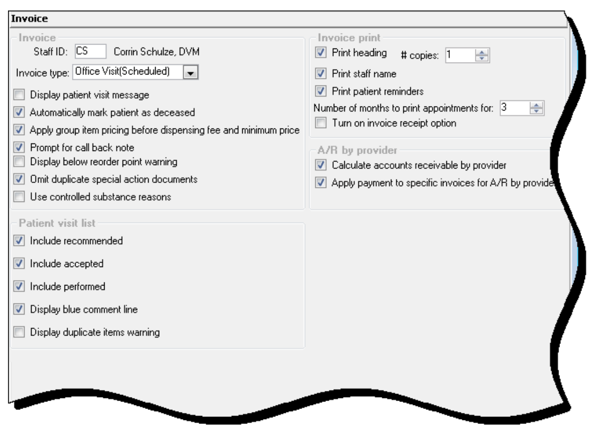


Figure D

(Controls > Defaults > Practice and Workstation > Invoice



<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="9">Invoice Item
See figure E</td><td>Item ID</td><td>To automatically assign item IDs, enter the starting item ID number.</td><td>Set up</td></tr>
<tr><td>Auto assign</td><td>Select this check box to automatically assign an item ID when a new item is added.</td><td>Select</td></tr>
<tr><td>Service tax</td><td>Select a default service tax rate to be used with any new service item created.
Originates from Controls > Taxes.</td><td>Select</td></tr>
<tr><td>Inventory tax</td><td>Select a default inventory tax rate to be used with any new inventory item created.
Originates from Controls > Taxes.</td><td>Select</td></tr>
<tr><td>Dispensing fee</td><td>If you have a default dispensing fee, enter it here to add the fee to any new inventory items that will be dispensed.</td><td>Set up</td></tr>
<tr><td>Service discount</td><td>Select any service discounts to be used with any new service item created.</td><td>Select</td></tr>
<tr><td>Inventory discount</td><td>Select any inventory discounts to be used with any new inventory item created.</td><td>Select</td></tr>
<tr><td>Unit of measure</td><td>Select a default unit of measure for any new inventory item created.</td><td>Select</td></tr>
<tr><td>Group item print option</td><td>Set a default option for the way groups are displayed when printed.
Options are:
Print all lines, show line amounts
Print all lines, show group total amount
Print detail lines only
Print group line only
This setting can be changed per group when the groups are created.</td><td>Set up</td></tr>
<tr><td rowspan="2">Passwords
See figure F</td><td>Use Enhanced Passwords</td><td>Select this check box to set up requirements for password strength and duration. The following settings are available:<table><tr><td>Minimum password length</td><td>Password must meet the specified minimum character length to be valid.</td></tr><tr><td>Password history</td><td>Password cannot be the same as the last [specified number] of passwords used.</td></tr><tr><td>Minimum password age</td><td>Password must be [specified number] of days old before it can be changed.</td></tr><tr><td>Maximum password age</td><td>Password must be changed every [specified number] of days.</td></tr></table></td><td>Set up</td></tr>
<tr><td>Password log on</td><td>Select this check box to allow users to log in with only a password (instead of user name and password). This option requires the use of unique passwords for each user name.</td><td>Set up</td></tr>
</table>

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	Default	Description	

Figure E

(Controls > Defaults > Practice and Workstation > Invoice Item)

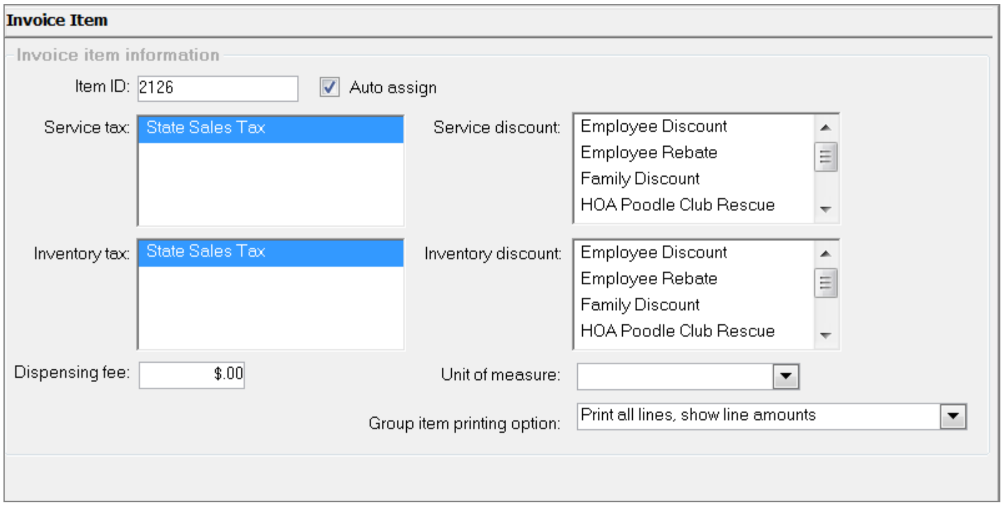
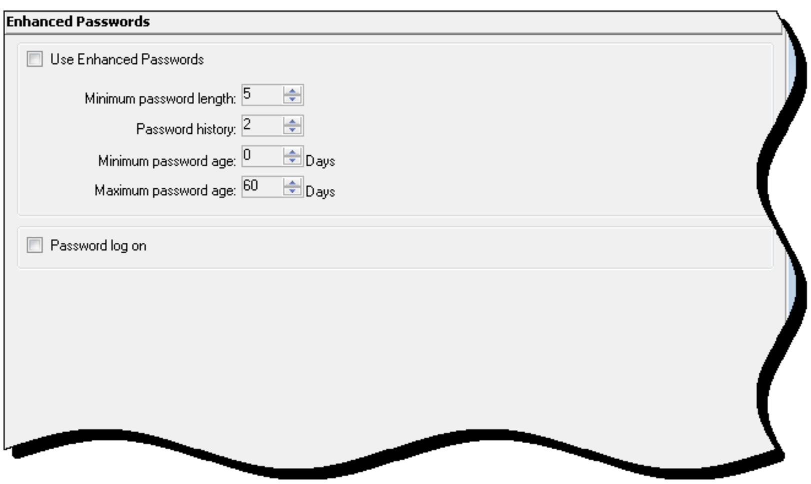


Figure F

(Controls > Defaults > Practice and Workstation > Passwords)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Patient *See figure G*	Patient ID	To automatically assign patient IDs, enter the starting patient ID number. Suggestion: Start at 1000 so that the patients have 4-digit IDs	**Verify**
	Auto assign	Select this check box to automatically assign a patient ID when a new patient is added.	**Verify**
	Recently accessed patients	Enter the number of recently accessed clients to be available on any given workstation (e.g., front desk, reception). To view this list of clients, press F7 (back) and F8 (forward) in the Patient List window.	**Verify**
	Classification	To save keystrokes when setting up a new patient, select a default classification that appears in the Patient Information window. This default can be changed as needed during setup. Originates from **Controls > Classifications**.	**Verify**
	Species	To save keystrokes when setting up a new patient, select a default species that appears in the Patient Information window. This default can be changed as needed during setup. Originates from **Lists > Species**.	**Verify**
	Staff ID for notes/Dx	To save keystrokes when entering medical notes or diagnoses, enter the staff ID of the staff member most likely to be entering patient comments and diagnostic notes. This default can be changed as needed during data entry. Originates from **Lists > Staff**.	**Verify**
	Quick Patient Label	Enter the correspondence document ID that is used for patient labels. Originates from **Lists > Documents > Templates**.	**Verify**
	Use most recent patient	Select this check box to display the patient whose record was last opened when you search for a patient or open windows that contain patient information, such as the Patient File, Patient Visit List, Vital Signs/Weight, Patient Reminders, Patient Diagnosis, etc.	**Verify**
	Show trainer and barn	Select tthis check box if you want to be able to enter a trainer and/or barn on the Patient Information window when setting up a new patient.	**Verify**
	Display breed	Select this check box to display the patient breed in the Patient List window. By default, Cornerstone displays the patient name, vaccine tag number, patient ID, microchip ID, and owner ID.	**Verify**
	Display owner name	Select this check box to display the owner's name in the Patient List window. By default, Cornerstone displays the patient name, vaccine tag number, patient ID, microchip ID, and owner ID.	**Verify**

<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="2">Prescriptions
See figure H</td><td>Prescription label/lab request label</td><td>View a snippet online demonstration
<table>
<tr><td>Print heading</td><td>Select this check box to print practice information on prescription and lab request labels.</td></tr>
<tr><td>Print staff license</td><td>Select this check box to print the license number for the veterinarian on the prescription label. This option may be required when printing a client address on the label.</td></tr>
<tr><td>Small font</td><td>Select this check box to use a smaller font for the text on prescription labels.</td></tr>
<tr><td>Print client addr if controlled substance</td><td>Select this check box to print the client’s address on prescription labels for controlled substances. (The Small font check box must also be selected.)</td></tr>
<tr><td>Print NDC/DIN</td><td>Select this check box to print the following identification numbers on the prescription label:
• United States–National drug code number (NDC)
• Canada—Drug identification number (DIN)
These numbers must be entered on the Inventory tab on the Invoice Item Information window. DINs are required on all medications in Canada. If no NDC/DIN number exists, the serial number will print in its place.</td></tr>
</table></td><td>Select</td></tr>
<tr><td>Prescription</td><td>
<table>
<tr><td>Warn user when quantity is 1</td><td>This warning displays to alert user that only one of this inventory item has been included on the prescription label. It is designed to prevent staff from incorrectly listing and/ or charging the number of items dispensed.</td><td>Select</td></tr>
<tr><td>Override expiration date</td><td>Select this check box if you want to override the expiration date associated with the physical inventory with the expiration date determined by the maximum number of months (see below).

For example, the current date is 4/15/12. The expiration date on the physical inventory is 6/15/13. The maximum number of months is set at 12 months.

If this check box is selected, the maximum number of months will override the physical inventory date, and the expiration date on the prescription label will be 4/15/13.

If no expiration date was entered on the physical inventory when it was received, this feature will not work and the date will have to be manually entered.</td><td>Select</td></tr>
</table></td><td>See Description</td></tr>
</table>

Controls > Defaults > Practice and Workstation					Action & Decision
Menu Access	**Default**	**Description**			
Prescriptions *See figure H (continued)*		Maximum number of months _____	Some states have maximum expiration dates for patient prescriptions. To use this option, enter the maximum number of months that a prescription is valid.	**Set up**	**See Description**
		Filled by staff required	Select this check box if your practice requires the staff to enter who fills each prescription.	**Set up**	
		Enter printer type 1 description (s) separated by semicolons(;)	Enter the printer type 1 description. (e.g., Front Desk Printer)	**Verify**	
		Lower label text down ___ units (50 units = 1 line)	Enter the number of units (50 units equal 1 line) required to lower the text for the first printer.	**Verify**	
		Enter printer type 2 description(s) separated by semicolons(;)	Enter the printer type 2 description. (ex. Front Desk Printer)	**Verify**	
		Lower label text down ___ units (50 units = 1 line)	Enter the number of units (50 units equal 1 line) required to lower the text for the second printer.	**Verify**	

Figure G

(Controls > Defaults > Practice and Workstation > Patient)

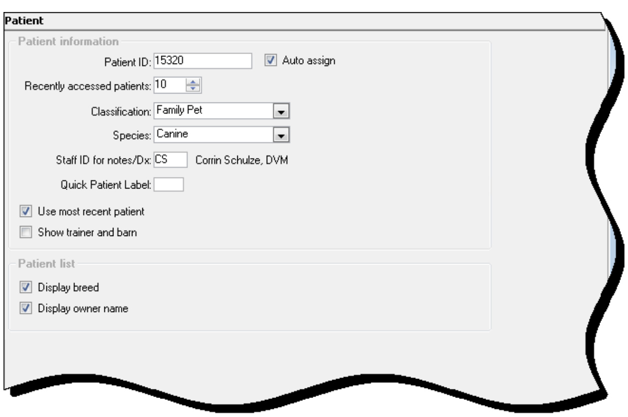
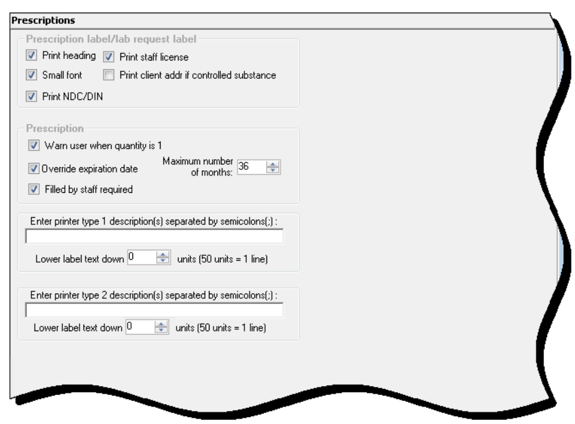


Figure H

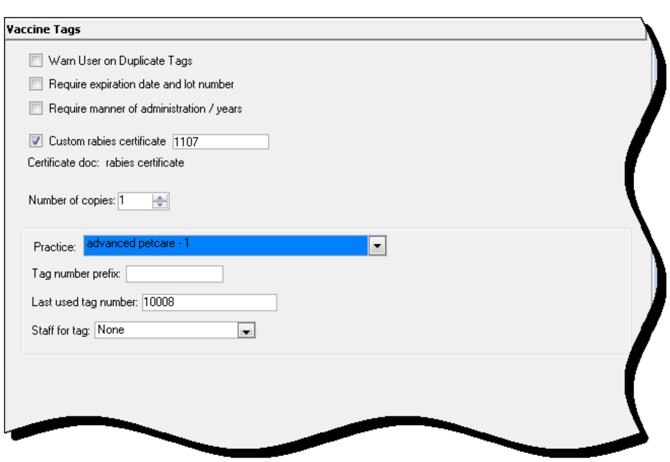
(Controls > Defaults > Practice and Workstation > Prescriptions)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Vaccine Tag *See figure I*	Warn User on Duplicate Tags	Select this check box to display a warning if a duplicate vaccine tag number is entered on the Vaccine Tag window when creating a tag.	**Set up**
	Require expiration date and lot number	Select this check box to require that a vaccine expiration date and lot number be provided on the Vaccine Tag window. (If lot numbers and expiration dates are tracked through Cornerstone inventory, these settings will be controlled by consumption.)	**Set up**
	Require manner of administration/years	Requires the manner of administration and number of years information to be provided on the Vaccine Tag window.	**Set up**
	Custom rabies certificate	To print a document other than the standard Cornerstone rabies certificate, select this check box and press F2 in the associated text box to select the custom certificate from a list of documents. Originates from **Lists > Documents > Templates**.	**Set up**
	Number of copies	Enter the default number of rabies certificates to print. This setting can be changed when the certificate is printed.	**Set up**
	Practice *Multi-Location Single Database (MLSD) configuration only*	The **Tag number prefix**, **Last used tag number**, and **Staff for tag** settings can be set up by practice if a Multi-Location Single Database configuration has been activated. Select the practice for which to specify these settings.	**Select**
	Tag number prefix *MLSD configuration only*	If you use a prefix with your vaccine tag numbers, enter a default prefix (up to five characters). This prefix displays on the Vaccine Tag window when creating a tag, but it can also be changed or removed at that time. For example, you could automatically attach a year prefix to every vaccine tag. If the year is 2012 and you use a prefix of 12, the resultant full tag number would be 12-[tag number].	**Set up**
	Last used tag number *MLSD configuration only*	To automatically generate tag numbers, enter the last-used tag number here. Cornerstone will increment by one for each vaccine tag created.	**Set up**
	Staff for tag *MLSD configuration only*	Select the staff ID for the staff member to display by default on the Vaccine Tag window when creating a tag.	**Set up**

Figure I

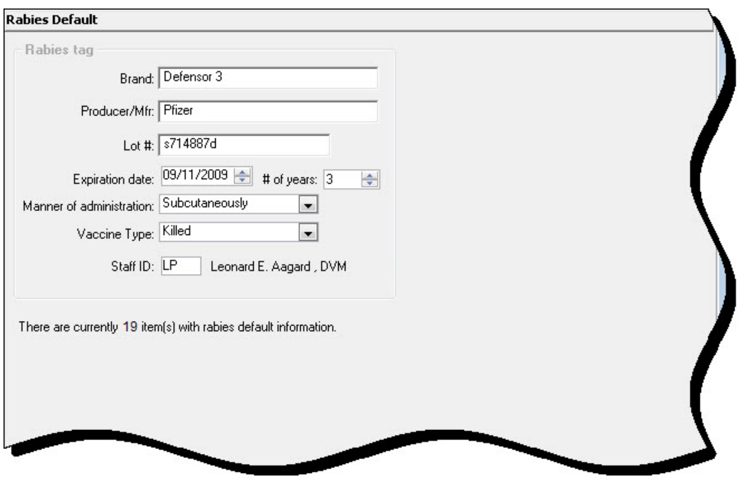
(Controls > Defaults > Practice and Workstation > Vaccine Tag)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Vaccine Tag > Rabies Default *See figure I-1*	Brand	Enter the brand of the rabies vaccination. Enter the Staff ID used for the rabies tag if a default DVM is used.	**Set up**
	Producer/Mfr	Enter the producer/manufacturer of the rabies vaccination.	**Set up**
	Lot #	Enter the lot number of the rabies vaccination.	**Set up**
	Expiration date # of years	Enter the expiration date and the number of years the rabies vaccination is good for.	**Set up**
	Manner of administration	Select the manner in which the rabies vaccination was administered.	**Set up**
	Vaccine Type	Select the vaccine type of the rabies vaccination.	**Set up**
	Staff ID	Select the staff ID for the staff member to use by default when creating a rabies tag.	**Set up**

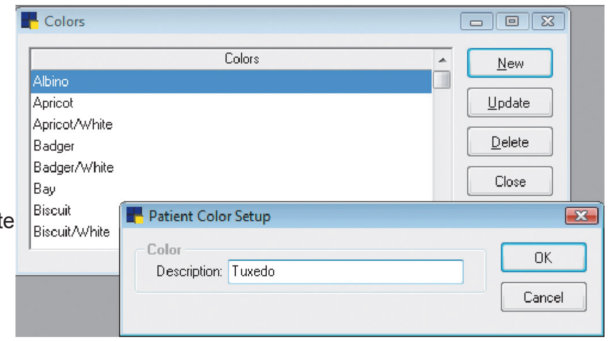
Figure I-1

(Controls > Defaults > Practice and Workstation > Vaccine Tag > Rabies Default)



Critical Go Live Default Settings

The following default settings are critical to set before the Go Live phase of the installation.

Menu Access	Description	Action & Decision
Controls > Colors	**Colors window** Cornerstone databases include an extensive list of colors based on AKC-recognized color lists. Changes and additions can be made as needed. Click **New** to add a color, click **Update** to update a color, or click **Delete** to delete a color. 	**Verify**
Controls > Reason for Visit	**Reasons for Visit window** This feature allows you to associate primary and secondary reasons with a patient's visit to indicate why the patient is being seen. This information helps staff to better prepare for scheduled appointments and monitor inpatients on the Electronic Whiteboard. Click **New** to add a new reason or **Update** to edit the selected reason. On the New/Update Primary or Secondary Reason window, type a description, add any alert notes, and add any check-in/check-out documents (set up with **Lists > Documents > Templates**) associated with the reason. To delete a reason, select it and click **Delete**.	**Verify**
Controls > Sex	**Patient Sex window** Sexes are used to defined the patient's gender and to prompt Cornerstone when a pet's sex is modified (e.g., females become spayed females). Used in the following manner throughout Cornerstone: • Patient Information window • Invoice items in smart groups; invoice item automatically added based on patient information • Invoice item special actions; change sex based on information in sex modification special action	**Verify**

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Controls > Billing Messages</td><td>Billing Messages window
These messages can be set up to print on the bottom of invoices, statements, and estimates. Documents can have default messages and/or messages can be selected at the time documents are printed.
<table>
<tr><th>Description Examples</th><th>Message Examples</th></tr>
<tr><td>Holiday Message</td><td>The staff of [Your Veterinary Hospital] wants to wish you, your family, and your pets a very happy and safe holiday season.</td></tr>
<tr><td>Statement Message</td><td>There is a 1.5% (minimum $2.00) finance charge applied to all balances over 30 days.</td></tr>
<tr><td>30 Day Overdue Statement Message</td><td>Your account is 30 days past due. Please remit full balance. If payment has already been sent, please disregard this notice.</td></tr>
<tr><td>60 Day Overdue Statement Message</td><td>Your account is 60 days past due. Please remit full balance. Your prompt attention to this oversight would be greatly appreciated. If payment has been mailed, please disregard this notice.</td></tr>
<tr><td>90 Day Overdue Statement Message</td><td>Your account is 90 days past due. Remit full balance due within 7 days or your account will be turned over to collections.</td></tr>
<tr><td>New Computer System</td><td>We appreciate your patience while we are learning to use our new computer system. We know this will allow us to better meet the needs of you and your pets.</td></tr>
</table>
Used in the following manner throughout Cornerstone:

Specific invoice message can be selected for an invoice
Default messages will be selected from this list for Controls > Defaults > Practice > Account & Messages tab
Initial Practice Setup Report by Billing Messages
</td><td>Verify</td></tr>
<tr><td>Controls > Estimate Messages</td><td>Estimate Message List window
These messages can be set up to print at the bottom of an estimate and/or can be set to print on a separate page when the estimate is printed.
<table>
<tr><th>Description Examples</th><th>Message Examples</th></tr>
<tr><td>Estimate Message</td><td>This estimate is valid for 30 days and includes only those items listed. Prices may vary upon services rendered. Payment will be required when your pet is released from the hospital.
Authorization____________________</td></tr>
<tr><td>Estimate Deposit</td><td>I agree to pay a deposit of __% of the estimate fees, assume financial responsibility for the remaining fees, and provide payment via cash, credit card, or check at the time my pet is discharged from the hospital.
Authorization: ___________________</td></tr>
</table>
Used in the following manner throughout Cornerstone:

Used to create longer estimate messages.
Multiple estimate messages can be added to the estimate (in addition to the billing message).
</td><td>Verify</td></tr>
</table>

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Controls > Price Change Reasons</td><td>

Price Change Reason List window

Price change reasons are needed by practices that choose to set one or more invoice item prices to be changed “only with a reason.” When a price is changed, staff members must use this list to signify why they changed the price. Price change reasons can be listed as an optional setup by setting as Not Required.

<table>
<tr><th>3-character Code Examples</th><th>Description Examples</th></tr>
<tr><td>PDJ</td><td>Per Dr. Jones</td></tr>
<tr><td>COM</td><td>Complimentary</td></tr>
</table>

Used in the following manner throughout Cornerstone:

- Used to enter reason for a price change when invoicing is tracked in a Standard Fee Exception Report.

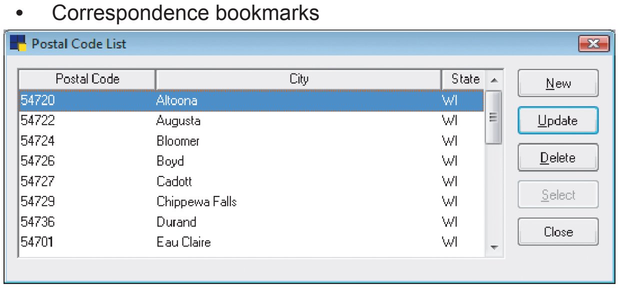
</td><td>Verify</td></tr>
<tr><td>Lists > Postal Codes</td><td>

Postal Code List window

To save key strokes when setting up new clients, build a postal code list. Cornerstone will fill in the city and state based on this postal code list.

Used in the following manner throughout Cornerstone:

- Client setup window, default postal code
- Client Master Report
- Mailing labels
- Correspondence bookmarks

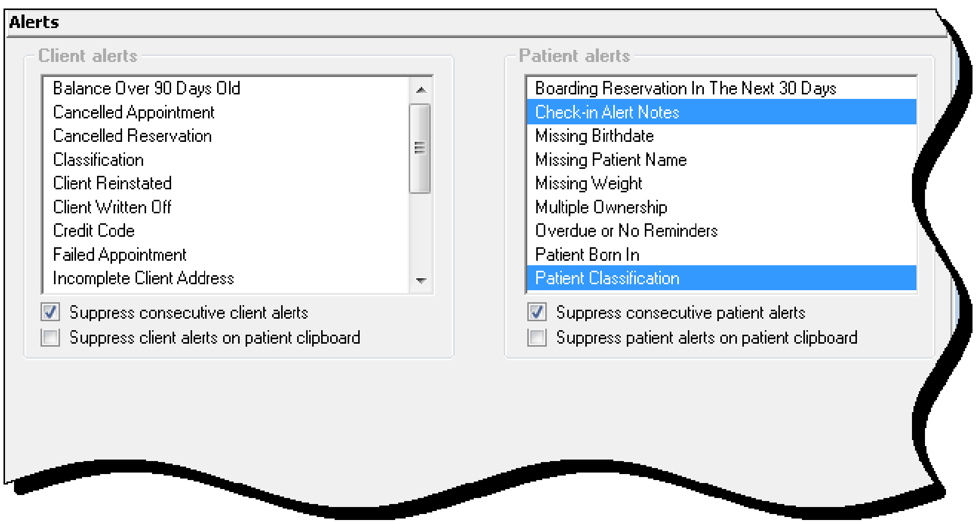


</td><td>Verify</td></tr>
</table>

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Alerts *See figure J*	Client alerts	Select the client alert items you want to display as alerts for the client. Selected items are highlighted in blue.	**Verify**
	Suppress consecutive client alerts	Select this check box if you want the alerts to display only once per client, per day.	**Verify**
	Suppress client alerts on Patient Clipboard	Clear this check box to display alerts when a client is accessed from the Patient Clipboard*.	**Verify**
	Patient alerts	Select the patient alert items you want to display as alerts for the patient. Selected items are highlighted in blue.	**Verify**
	Suppress consecutive patient alerts	Select this check box if you want the alerts to display only once per day.	**Verify**
	Suppress patient alerts on Patient Clipboard	Clear this check box to display alerts when a patient record is accessed from the Patient Clipboard.	**Verify**

Figure J

(Controls > Defaults > Practice and Workstation > Alerts)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Alerts > Compliance Alerts *See figure K*	Compliance alerts	If using the Compliance Assessment Tool*, select protocols for which you want alerts to display.	**Verify**
	Display predefined IDEXX protocols	Cornerstone has pre-defined a number of protocols that can be used. Select this check box to display alerts for these protocols..	**Verify**
	Display compliance alerts	If using the Compliance Assessment Tool, select where in Cornerstone you want the alerts to display.	**Verify**
Check-in *See figure L*	Reason for visit	Select a default reason for visit to appear in new appointments. Originates from **Controls > Reason for Visit**.	**Verify**
	Default room	Select a default room to appear in a new appointment.	**Verify**
	Staff ID	Enter a default staff ID that to appear in a new appointment. Leave blank if you don't want to use a default staff ID.	**Verify**
	Verify check out	Select this check box if you want to be prompted to verify check out when you click **Check-out** on the Census List or the Check-in window.	**Verify**
	Use check-in date for compliance	Select this check box if you want to use the patient's check-in date for compliance within the Compliance Assessment Tool. If this check box is not selected, all patients will be counted in calculating compliance, even if they only came in to purchase food.	**Verify**

Figure K

(Controls > Defaults > Practice and Workstation > Alerts property > Compliance Alerts)

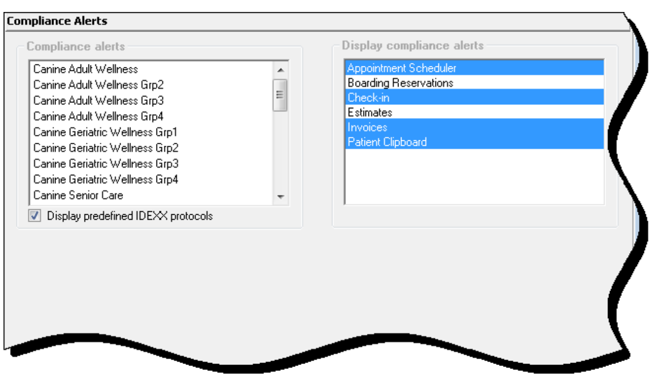
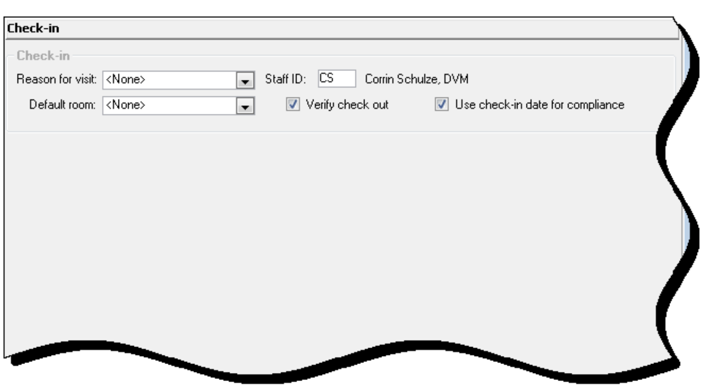


Figure L

(Controls > Defaults > Practice and Workstation > Check-in)



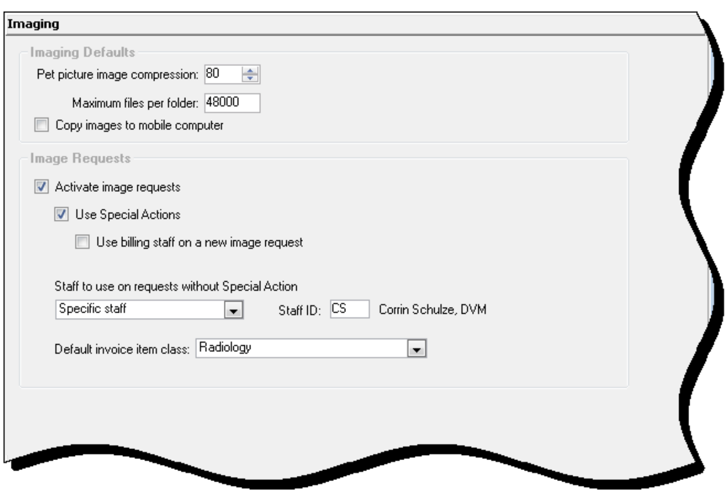
Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Check-in > Check-in Print Options	Information to print	This window allows you to decide what information will print on the Check–in Report. For most selected items you can designate a date range (e.g., All, Last month, Last three months, etc.). See the table below to view the check-in item and any specific date ranges.	**Verify**

Print Option	Date Range	Check–In Item	Date Range
Billing information	All, Last 3 (6, 12, 18, 24) months	Lab results	All, Last 3 (6, 12, 18, 24) months
Client referrals		Expand lab results	N/A
Medical notes		Images	All, Last 3 (6, 12, 18, 24) months
		Image cases	
Hide Whiteboard Notes	N/A	Patient referrals	
Departing instructions	All, Last 3 (6, 12, 18, 24) months	Call backs	
Reminders	All, Due in 1 (3, 6, 12) months	Problems	
Weight/Body score	All, Last 3 (6, 12, 18, 24) months		
Vital Signs			
Diagnostic codes			
Appointments	All, Due in 1 (3, 6, 12) months	Hide voided items	N/A
Exams	All, Last 3 (6, 12, 18, 24) months	Print birth date as age	N/A
Patient prompts	N/A	Communications	All, Last month, Last 3 (6, 12, 18, 24) months
		Print check–in report	Always Ask, Always Print, Never Print
Prescriptions	All, Last 3 (6, 12, 18, 24) months	Print history in date order	N/A
		# of lines of history to print _________	All, 1-100

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Imaging *See figure M*	Pet picture image	Enter the compression setting for pet pictures. The range is from 1 (small file and lower quality) to 99 (larger file and highest possible quality).	**Verify**
	Maximum files per folder	Enter the maximum number of files allowed in each folder.	**Verify**
	Copy images to mobile computer	Select this check box to copy images to your mobile computer. This option is available only to those using the mobile computing module.	**Verify**
	Activate image requests	Select this check box to require requests for imaging.	**Verify**
	Use Special Actions	Select this check box to use special actions for imaging.	**Verify**
	Use billing staff on a new image request	Select this check box to include the billing staff member on a new image request.	**Verify**
	Staff to use on requests without Special Action	Determine if a staff member should appear on requests without a special actions. If the **Specific staff** option is selected, enter the staff ID for the staff member to use on imaging requests without special actions.	**Verify**
	Default invoice item class	Select a default invoice item classification for imaging.	**Verify**

Figure M

(Controls > Defaults > Practice and Workstation > Imaging)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
View a snippet online demonstration **Invoice > Invoice Address** *See figure N*	Client Address	To adjust the placement of the client address on the invoice when using window envelopes, click the **Client Address** box and use the arrow keys on your keyboard to adjust the location.	**Verify**
	Print practice address on invoices	Select this check box to print the practice address on invoices. . If you are using letterhead or preprinted paper, clear the check box.	
	Practice Address	To adjust the placement of the practice address on the invoice when using window envelopes, click the **Practice Address** box and use the arrow keys on your keyboard to adjust the location.	
	Use address layout for estimates	Select this check box to use this address layout for estimates.	
	Print practice logo on estimates	Select this check box to print the practice logo on estimates	
	Align Practice Address text	Select an alignment option for the practice address text on estimates.	
	Reset	Click the **Reset** button to reset the alignment for address text.	
	Test Page	Click the **Test Page** button to print a test page.	
Messages *See figure O*	Billing messages • Invoice • Estimate footer • Current • 30 days • 60 days • 90 days	Select default messages that you previously set up (**Controls > Billing > Messages**) for invoices, estimate document footer, and statements.	**Verify**
	Enable phone list file generation	Select this check box if you want to be able to generate a phone list file.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	Default	Description	

Figure N

(Controls > Defaults > Practice and Workstation > Invoice > Invoice Address)

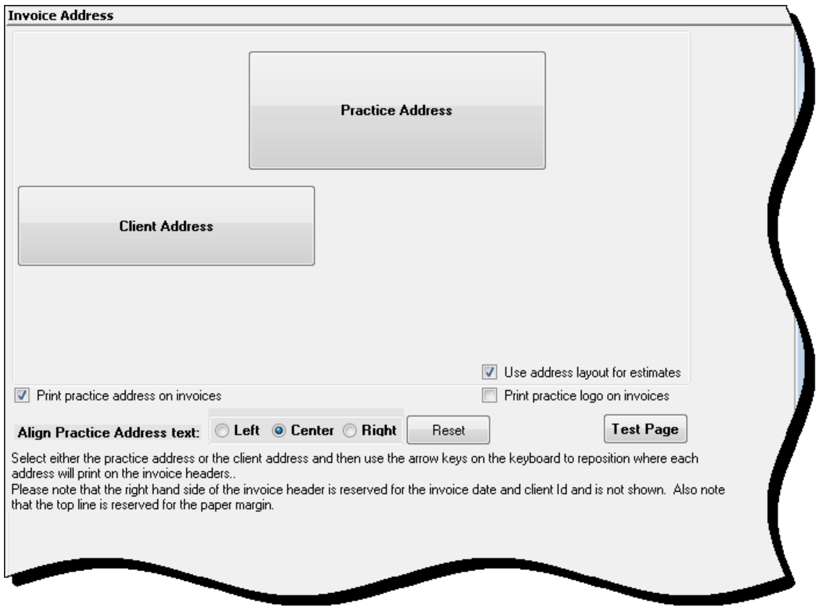
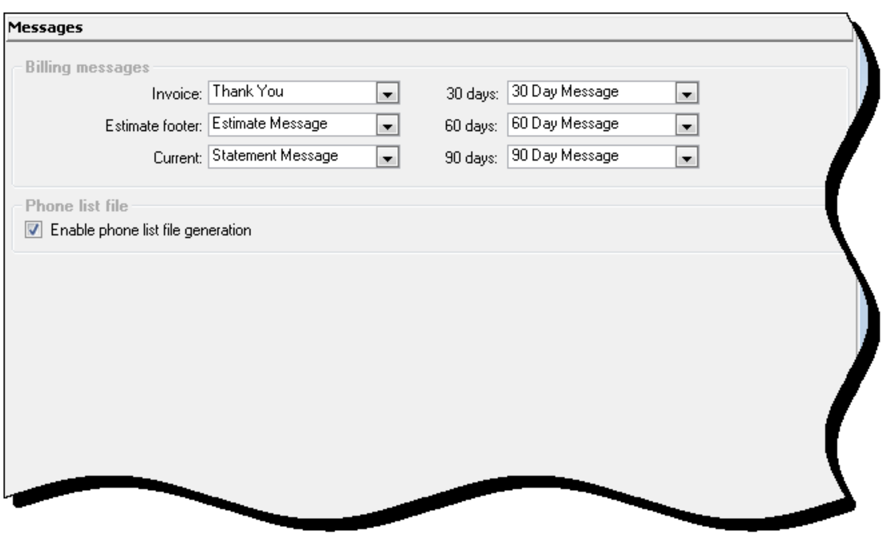


Figure O

(Controls > Defaults > Practice and Workstation > Messages)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Report Language *See figure P*	Select Language	Select the language (**English**, **Espanol**, or **Francais**) to use for reports, and customize specific headings that print on the following types of client documents.	**Set up**
	Customize specific field names	In the list of field names that can be customized, click in the right column and type a new field name to correspond to the field listed in the left column.	**Set up**
Required Data *See figure Q*	Client data	Select the client data fields that are required to be completed when working with a client file. Cornerstone requires **Name** and **Credit Code**; these requirements cannot be changed.	**Verify**
	Client prompts	Select the client prompts that are required to be completed when working with a client file.	**Verify**
	Account data	Select **Comments on Account Adjustment** and/or **Comment on Write Offs** if you require them.	**Verify**
	Patient data	Select the patient data fields that are required to be completed when working with a patient file. Cornerstone requires **Breed**, **Sex**, and **Species**; these requirements cannot be changed.	**Verify**
	Patient prompts	Select the patient prompts that are required to be completed when working with a patient file.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	Default	Description	

Figure P

(Controls > Defaults > Practice and Workstation > Report Language)

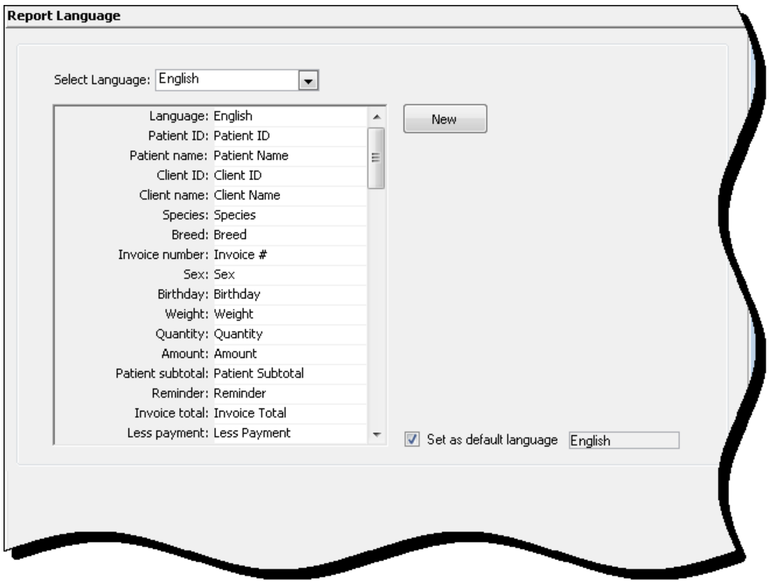
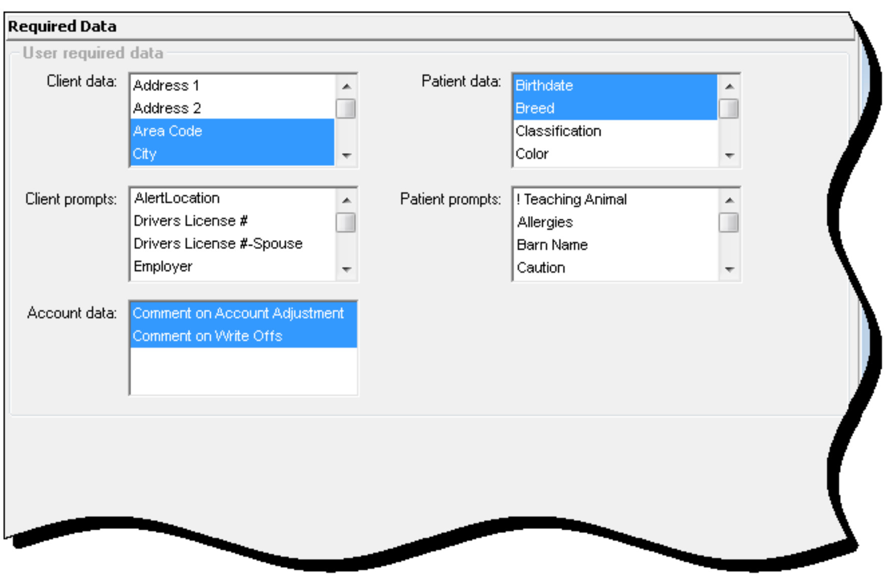


Figure Q

(Controls > Defaults > Practice and Workstation > Required Data)



Controls > Defaults > Practice and Workstation			**Action & Decision**
Menu Access	**Default**	**Description**	
Workstation (Defaults are set per workstation) *See figure R*	Print Patient pictures on	Select the client correspondence items on which to print the patient's picture. The patient's picture can print on the Boarding Check-in Report, Check–in Report, estimates, invoices, prescription labels, rabies certificates, and reminders.	**Verify**
	Invoice Print	The **Invoice Print** list is enabled if the **Turn on invoice receipt** check box is selected in Invoice defaults. Select the default invoice printing option for this workstation: • **Full Invoice**—Prints full-page (8 1/2" x 11") invoices. • **Invoice Receipt**—Prints 3 1/8" invoice receipts (Epson® TM-T88IV receipt printer required for printing invoice receipts).	**Verify**
	Document Settings • Margins • Fonts • Effects	Set the individual options for margins, fonts (click the **Change Fonts** button), and effects to use by default for documents created on this workstation.	**Verify**
	_________ is currently set as the end of period workstation	This box displays the workstation that is currently set as the End of Period workstation. This allows you to see which workstation (computer) is set to run the unattended End of Period processes from any from any workstation.	**Verify**
	Use this workstation to run unattended end of period processes	Select this check box to set the current workstation (the computer you are currently working on) as the End of Period workstation).	**Verify**
	Whiteboard sort • Sort patients by	Select the method for sorting patients on the Electronic Whiteboard.	**Select**
Workstation > Workstation – All *See figure S*	Workstation *Multi-Location Single Database (MLSD) configuration only*	The Workstation–All default settings allow you to set a default workstation inventory location. The name of the workstation on which you are currently working is displayed. To change the workstation to which the default inventory location will apply, select the workstation from the list.	**Verify**
	Default Practice *MLSD configuration only*	The name of the current practice is displayed. To change the practice to which the default inventory location will apply, select the practice from the list.	**Verify**
	Location Group *MLSD configuration only*	Select a location group to filter the items displayed in the **Location** list below. This is especially helpful if a workstation is primary used for a retail area or pharmacy area.	**Verify**
	Location *MLSD configuration only*	This option allows each workstation to be set up with a default location. When depleting inventory, the location selected here is automatically used for the specified workstations.	**Verify**
	Print *MLSD configuration only*	Click the **Print** button to print a report containing all default inventory locations by workstation.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	Default	Description	

Figure R

(Controls > Defaults > Practice and Workstation > Workstation)

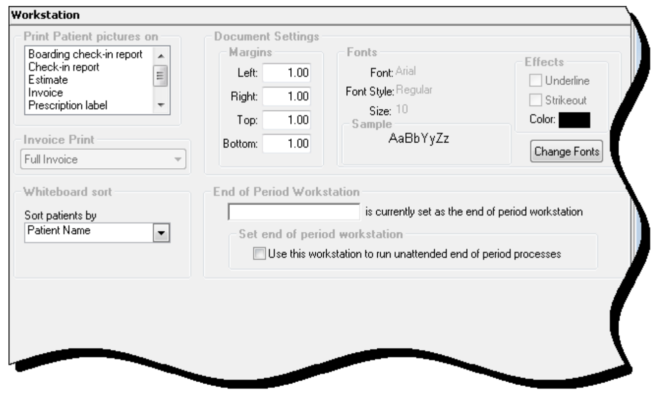
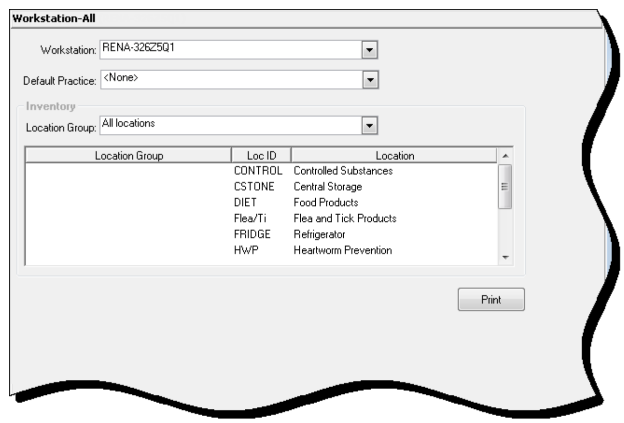


Figure S

(Controls > Defaults > Practice and Workstation > Workstation – All)



Advanced Use and Owner/Manager Responsibility Default Settings

The following defaults are important for advanced use and owner/manager responsibility.

<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="6">End of Period
See figure T</td><td>Daily reports</td><td>Select each report to print by default.</td><td>Select</td></tr>
<tr><td>Monthly reports</td><td>Select each report to print by default.</td><td>Select</td></tr>
<tr><td>Yearly reports</td><td>Select each report to print by default.</td><td>Select</td></tr>
<tr><td>Monthly closing</td><td><table>
<tr><td>Finance charge percent</td><td>Select this check box to include this charge, and then type the percentage in the box.</td></tr>
<tr><td>Minimum finance charge percent</td><td>Select this check box to include this charge, and then type the amount in the box.</td></tr>
<tr><td>Billing charge</td><td>Select this check box to include this charge, and then type the amount in the box.</td></tr>
<tr><td>Billing threshold</td><td>Select this check box to include this threshold, and then type the amount in the box.</td></tr>
</table></td><td>Select</td></tr>
<tr><td>Run End of Day before and after mobile computer synchronization
Mobile Computing only</td><td>Select this check box to run the End of Day process before and after synchronizing mobile computers.</td><td>Verify</td></tr>
<tr><td>Computers must be synchronized within ___ hours before End of Month
Mobile Computing only</td><td>Select this check box if mobile computers must be synchronized before the End of Month process, and then enter the number of hours within which synchronization must occur.</td><td>Verify</td></tr>
<tr><td rowspan="2">Daily Entries Report
See figure U</td><td>• Include invoice entries on report
• Include Patient Visit List entries on report</td><td>These settings allow you to specify how your practice tracks changes, additions, and deletions of billed lines on the invoice or the Patient Visit List.
To help you maintain the integrity of your practice data, the Daily Entries Report audit includes all lines on open or closed invoices and the user ID of the person who is logged in.
Include invoice entries on report: Select this check box, and then select the check box for each invoice entry to include. Options are Item ID, Quantity, Amount, Staff ID, and Revenue ID.
Include Patient Visit List entries on report: Select this check box, and then select the check box for each Patient Visit List entry to include. Options are Status, Item ID, Quantity, Amount, Staff ID, and Revenue ID.
For practices using the Mobile Computing module, changes and deletions performed on a mobile computer will not display on these reports. When synchronization is run, the entries will display as additions to the reports.
This information can be printed on several reports. The reports are located under Reports > End of Period > End of Day > Daily Inv. and PVL Entries.</td><td>Verify</td></tr>
<tr><td>Number of months to keep report information</td><td>Enter the number of months to keep the information for this report.</td><td>Verify</td></tr>
</table>

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	Default	Description	

Figure T

(Controls > Defaults > Practice and Workstation > End of Period)

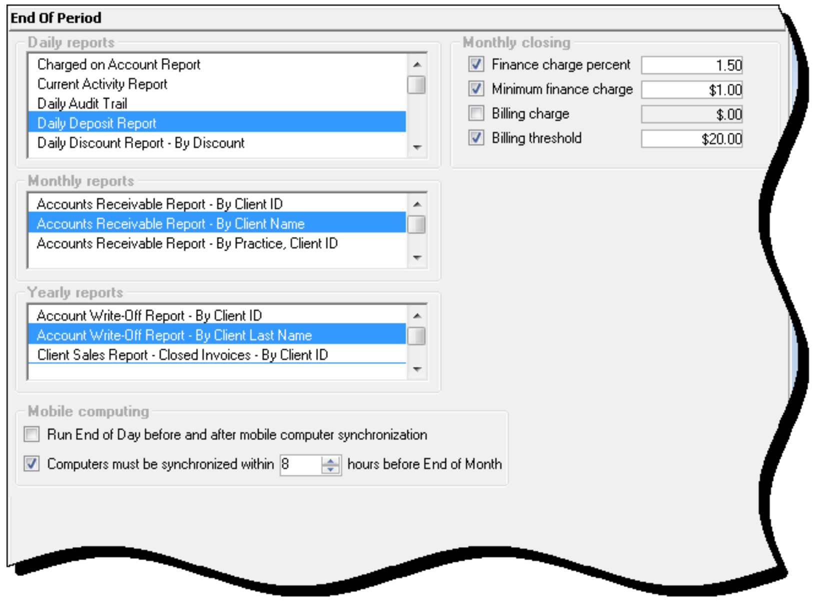
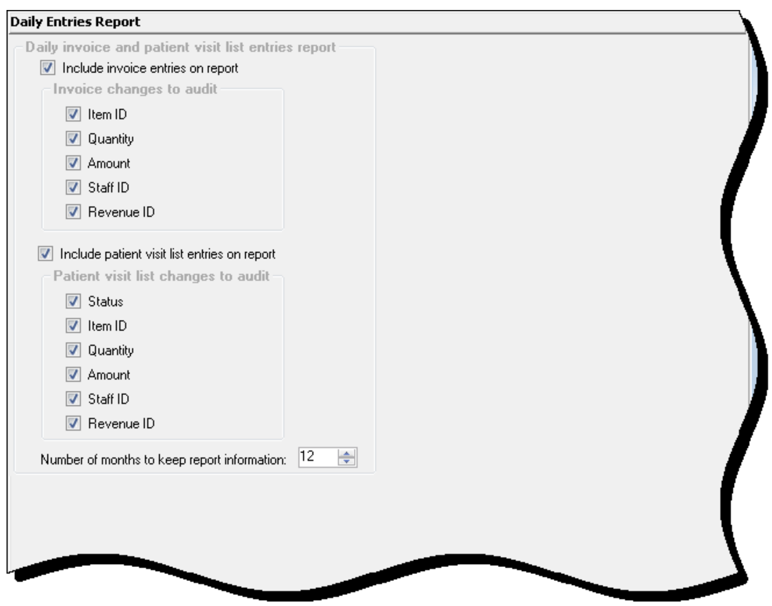


Figure U

(Controls > Defaults > Practice and Workstation > Daily Entries Report)



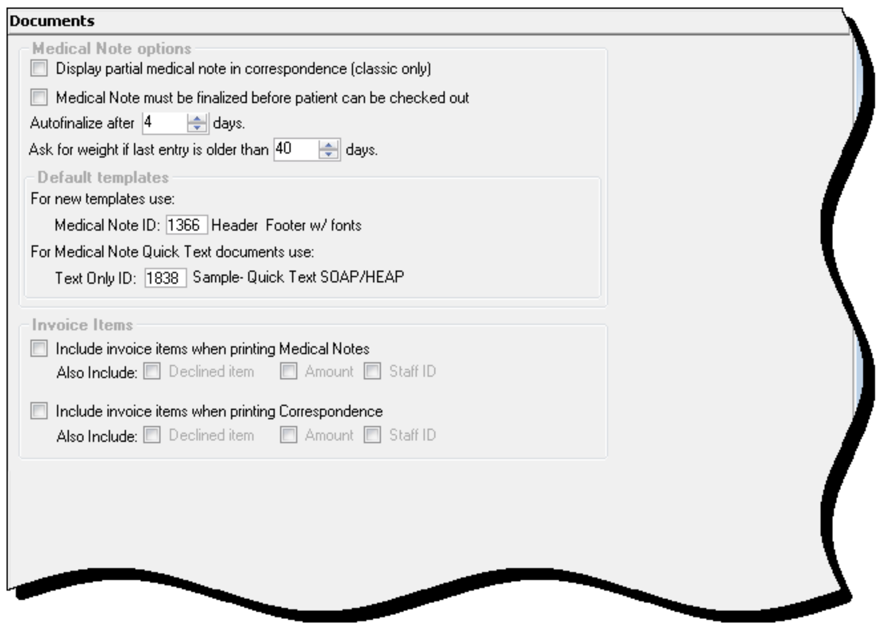
<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="4">Documents
See figure V</td><td>Medical Note options</td><td><table>
<tr><td>Display partial medical note in correspondence (classic only)</td><td>Select the check box for Display partial medical notes in Correspondence to be able to select which information from your medical note templates to include in correspondence documents where medical note bookmarks are being used.</td></tr>
<tr><td>Medical Note must be finalized before patient can be checked out</td><td>Select the check box for Medical Note to be finalized before patient can be checked out if you want medical notes to be finalized prior to patient check out.</td></tr>
<tr><td>Auto finalize after ___ days</td><td>Select the number of days before the medical notes will be automatically finalized.</td></tr>
<tr><td>Ask for weight if last entry is older than ___ days</td><td>Select the number of days for the computer to prompt for a weight entry.</td></tr>
</table></td><td>Verify</td></tr>
<tr><td>Default templates</td><td><table>
<tr><td>For new templates use</td><td>Select the Medical Note template you want to use as a default.</td></tr>
<tr><td>For Medical Note Quick Text documents use</td><td>Select the Quick Text Medical Note you want to use as a default.</td></tr>
</table></td><td>Verify</td></tr>
<tr><td>Include invoice items when printing Medical Notes</td><td>Select this check box to include invoice items when printing medical notes. Select the Also include check box to add the following options: Declined item, Amount, and Staff ID.</td><td>Verify</td></tr>
<tr><td>Include invoice items when printing Correspondence</td><td>Select this check box to include invoice items when printing correspondence documents. Select the Also include check box to add the following options: Declined item, Amount, and Staff ID.</td><td>Verify</td></tr>
<tr><td>Documents > Favorite Documents
See figure W</td><td>Favorite document templates</td><td>In the first empty ID field, enter the document ID of the medical note or correspondence documents you would like to include on your Favorites list. (Lists > Documents > Templates).</td><td>Set up</td></tr>
<tr><td rowspan="5">Inventory
See figure X</td><td>Vendor ID</td><td>Enter a default vendor ID for orders placed or received in Cornerstone inventory.</td><td>Verify</td></tr>
<tr><td>Order ID</td><td>Enter a default order ID as the starting order number for orders in Cornerstone inventory.</td><td>Verify</td></tr>
<tr><td>Usage tax</td><td>Select a default usage tax to be applied to items used internally in Cornerstone inventory. Please check state laws regarding when or if usage taxes are assessed.</td><td>Verify</td></tr>
<tr><td>Show item history for ____ months</td><td>Enter a number of months for an inventory item's history to display in Cornerstone inventory.</td><td>Verify</td></tr>
<tr><td>Receiving location</td><td>Select a default location for receiving your inventory into a specific location in Cornerstone inventory. When you receive inventory, you will have the option to select which location to receive it into.</td><td>Verify</td></tr>
</table>

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Inventory *See figure X (continued)*	Auto confirm adjustments	Select this check box to automatically confirm your adjustments in Cornerstone inventory. However, you may want to manually confirm them while learning inventory to verify each adjustment was done correctly.	**Verify**
	Auto confirm stock transfer	Select this check box to automatically confirm your stock transfers in Cornerstone inventory. However, you may want to manually confirm them while learning inventory to verify each adjustment.	**Verify**
	Delete want items on completed	Select this check box if you do not want to manually delete items from the Want List after item is processed.	**Verify**
	Print purchase order notes	Select this option to automatically print the purchase order notes.	**Verify**
	When inventory details need to be verified—Prescriptions	Select one of the following options: **Not required**: You will not be required to enter lot numbers and expiration dates on the Prescription window for items tracking lot numbers and expiration dates. **Warn if not verified**: A warning will appear if lot numbers and expiration dates are not entered, giving you the option on the Prescription window for items tracking lot numbers and expiration dates. **Required**: You will be required to enter lot numbers and expiration dates on the Prescription window for items tracking lot numbers and expiration dates.	**Verify**
	When inventory details need to be verified—Performed PVL items and Saved Invoices	Select one of the following options: **Not required**: You will not be required to enter lot numbers and expiration dates on the Patient Visit List or saved invoices on items tracking lot numbers and expiration dates. **Warn if not verified**: A warning will appear if lot numbers and expiration dates are not entered giving you the option to enter lot numbers and expiration dates on the Patient Visit List or saved invoices on items tracking lot numbers and expiration dates. **Required**: You will be required to enter lot numbers and expiration dates on the Patient Visit List or saved invoices on items tracking lot numbers and expiration dates.	**Verify**
	When inventory details need to be verified—Performed Document Items	Select one of the following options: **Not required**: You will not be required to enter lot numbers and expiration dates at the time that invoice items are sent from the document to the Patient Visit List on items tracking lot numbers and expiration dates. **Warn if not verified**: A warning will appear if lot numbers and expiration dates are not entered giving you the option to enter lot numbers and expiration dates at the time that invoice items are sent from the document to the Patient Visit List on items tracking lot numbers and expiration dates. **Required**: You will be required to enter lot numbers and expiration dates at the time that invoice items are sent from the document to the Patient Visit List on items tracking lot numbers and expiration dates.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Inventory *See figure X (continued)*	Inventory depletion—Automatically mark inventory details as verified when the location is defaulted in	Select this check box if your inventory items are tracking quantity on hand, and you will be required to deplete those items from a specific location and verify that location. If you select this check box, it will automatically mark inventory details as verified when the location is defaulted in unless tracking lot number and expiration date for the selected item. In this case, you will have to select which lot and expiration date you are depleting.	**Verify**
	Inventory depletion—Automatically default in the oldest expiration date in the location	Select this check box if you want inventory items to default to the oldest expiration date for a given item in a given location.	**Verify**

Figure V

(Controls > Defaults > Practice and Workstation > Documents)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	

Figure W

(Controls > Defaults > Practice and Workstation > Documents > Favorite Documents)

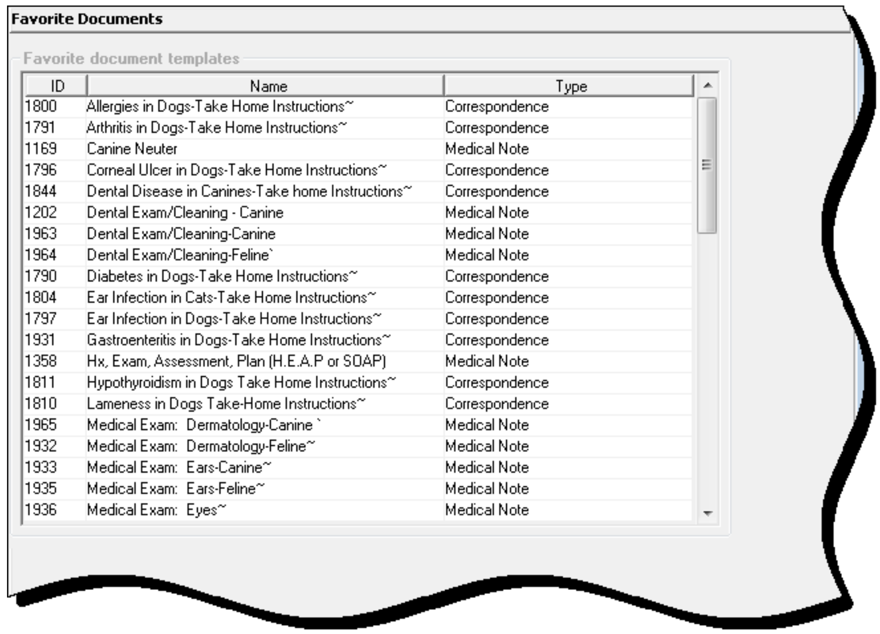
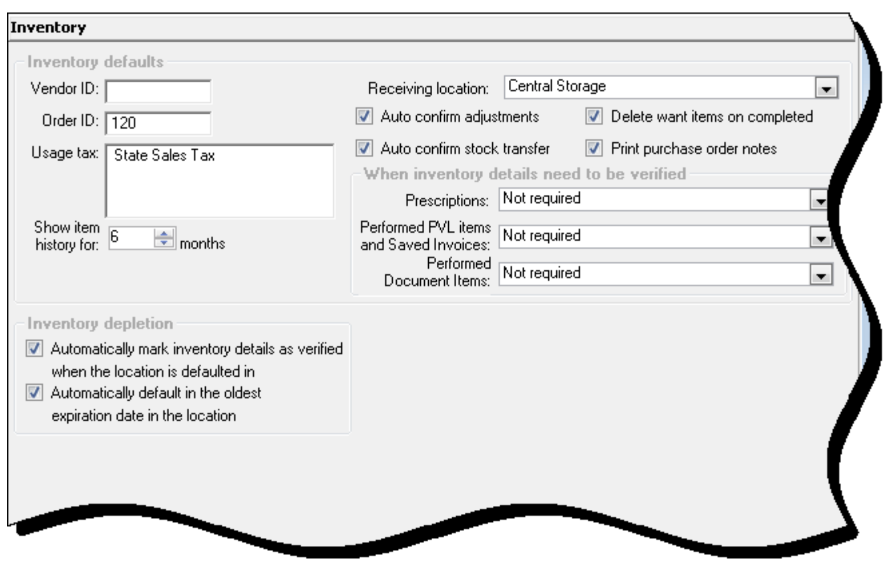


Figure X

(Controls > Defaults > Practice and Workstation > Inventory)

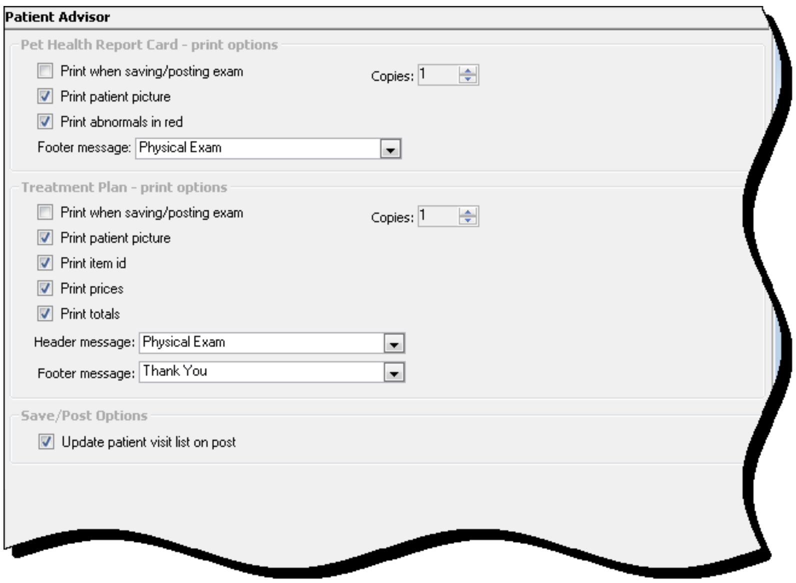


Controls > Defaults > Practice and Workstation				Action & Decision
Menu Access	**Default**	**Description**		
Patient Advisor *See figure Y*	Pet Health Report Card—print options	Print when saving/posting exam	Select this check box to automatically print the Pet Health Report Card when saving or posting the exam.	**Verify**
		Print patient picture	Select this check box to print the patient's picture on the Pet Health Report Card.	
		Print abnormals in red	Select this check box to print abnormal results in red.	
		Footer message	Select the exam message that will print on all physical exams.	
		Copies	Enter the number of copies to print.	
	Treatment Plan—print options	Print when saving/posting exam	Select this check box to automatically print the treatment plan when saving or posting the exam.	**Verify**
		Print patient picture	Select this check box to print the patient's picture on the treatment plan.	
		Print item id	Select this check box to print item IDs on the treatment plan.	
		Print prices	Select this check box to print prices on the treatment plan.	
		Print totals	Select this check box to print totals on the treatment plan.	
		Header message	Select the message that will print on the header of the treatment plan.	
		Footer message	Select the message that will appear on the footer of the treatment plan.	
		Copies	Enter the number of copies to print.	
	Save/Post Options	Select this check box to update the Patient Visit List once a treatment plan is posted.		**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	

Figure Y

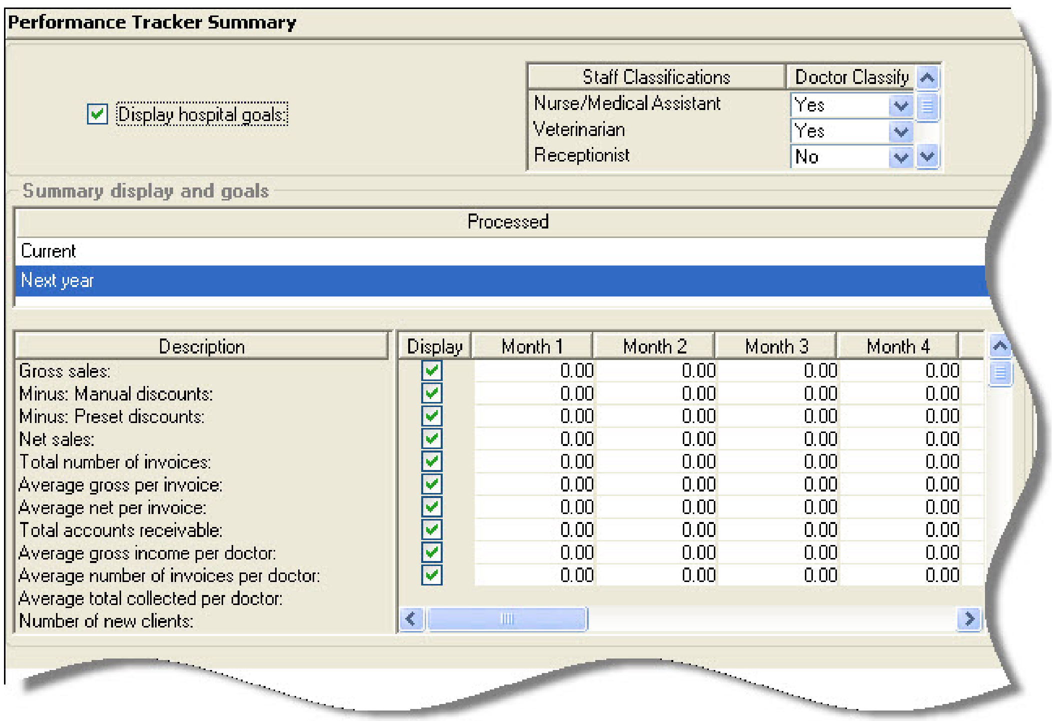
(Controls > Defaults > Practice and Workstation > Patient Advisor)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Performance Tracker *See figure Z*	Display hospital goals	Click the **Display hospital goals** check box if you want to see the hospital goals in Performance Tracker.	**Verify**
	Staff Classifications/ Doctor Classify	Specify which staff classifications at your practice are “doctors” by selecting **Yes** or **No** in the *Doctor Classify* field for each staff classification your practice has set up.	**Verify**
	Summary Display and Goals	Practices have the ability to set goals by month. In the **Summary display and goals** area, select the time period for which you want to set goals (**Current** or **Next year**), and then click to select options for which you want to set goals and enter the dollar amounts.	**Verify**

Figure Z

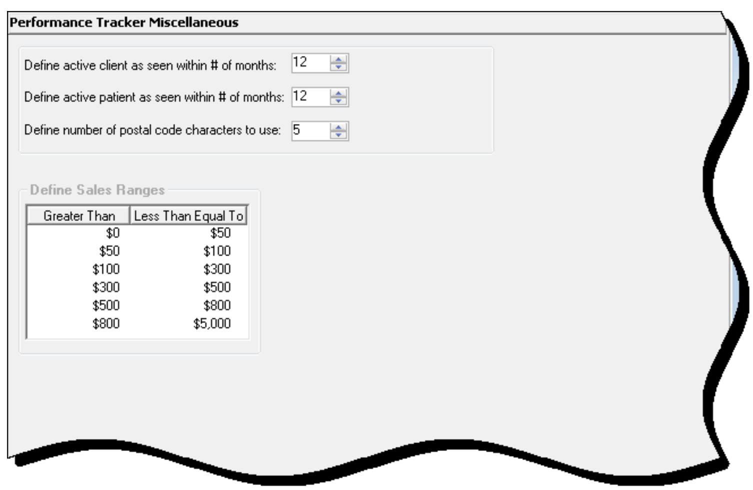
(Controls > Defaults > Practice and Workstation > Performance Tracker)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Performance Tracker > Miscellaneous – Performance Tracker *See figure AA*	Define active client as seen within # of months	In the **Define active client as seen within # of months** box, specify the frequency of office visits (in months) used to determine your practice's definition of an active client. For example, if your practice defines an "active client" as a client that's visited your office in the last year, enter 12 months.	**Verify**
	Define active patient as seen within # of months	In the **Define active patient as seen within # of months** box, specify the frequency of office visits (in months) used to determine your practice's definition of an active patient. For example, if your practice defines an "active patient" as a patient that has been seen in your office in the last two years, enter 24 months.	**Verify**
	Define number of postal code characters to use	In the **Define number of postal code characters to use** box, specify the number of postal code characters by which results will be sorted (Cornerstone Performance Tracker sorts your sales by postal code). We recommend the United States users leave this set at the default of 5 characters. Enter 9 to sort results by individual ZIP codes. We recommend that Canadian users enter 6.	**Verify**
	Define Sales Ranges	Sales ranges display on the **Client** tab in Cornerstone Performance Tracker. If you want to adjust the default ranges, in the **Define Sales Ranges** area, click the sales range number to change in the **Less Than Equal To** column and update the number. For example, if you want your sales range to be $0–$100, $100–$200, or $200–$300, click the number to change and enter the new number.	**Verify**

Figure AA

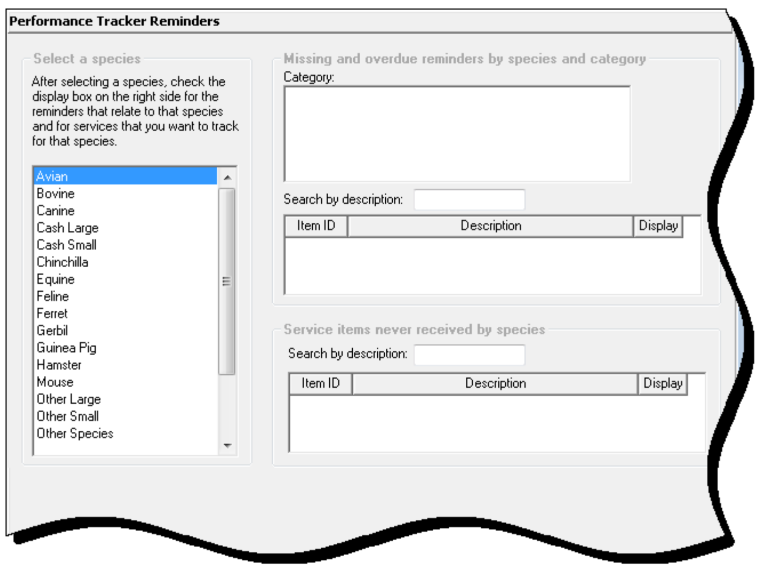
(Controls > Defaults > Practice and Workstation > Performance Tracker > Miscellaneous – Performance Tracker)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Performance Tracker > Reminders – Performance Tracker *See figure BB*	Select a species	Click to select a species. The reminders and services related to that species display on the right side of the configuration pane.	**Verify**
	Missing and overdue reminders by species and category • Category • Search by description	Set the following defaults: • Select the category from the **Category** list. • To create a new reminder category, right-click in the **Category** box and select **New**, and then type the name of your new category. • Use the **Search by description box** to locate the reminders you want to place in this category, and then select the **Display** check box next to the applicable reminders.	**Verify**
	Service items never received by species—Search by description	Find the services you want to associate with this species and click the **Display** check box next to the service.	**Verify**

Figure BB

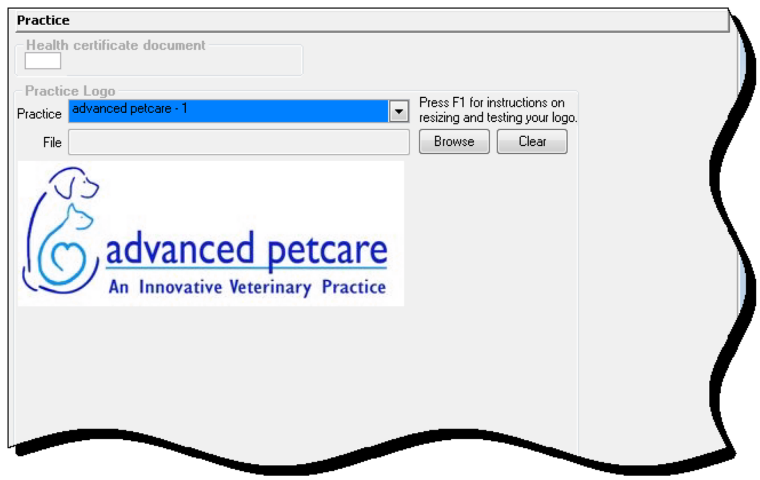
(Controls > Defaults > Practice and Workstation > Performance Tracker > Reminders – Performance Tracker)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Practice *See figure CC*	Health certificate document	Press F2 to search for and select the document to use as your health certificate document.	**Select**
	Practice Logo	Select the practice (for multiple practices) for which you want to add the practice logo. **Browse** to select the practice log file. Select the **Clear** button to clear the practice log and select a different one.	**Set up**

Figure CC

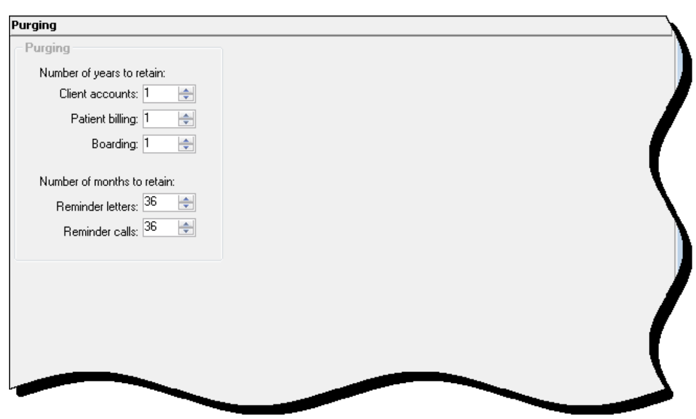
(Controls > Defaults > Practice and Workstation > Practice)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Purging *Your must run three End of Year processes before Cornerstone will activate the Purging feature.* *See figure DD*	Number of years to retain – Client accounts	Setting the purge information here will take effect only when the **Purge Data** option is selected in the **Tools** menu. This information is used to determine a safety margin when purging data from the system. Enter the number of years that client account information should be retained.	**Verify**
	Number of years to retain – Patient billing	Setting the purge information here will take effect only when the **Purge Data** option is selected in the **Tools** menu. This information is used to determine a safety margin when purging data from the system. Enter the number of years patient billing information should be retained.	**Verify**
	Number of years to retain – Boarding	Setting the purge information here will take effect only when the **Purge Data** option is selected in the **Tools** menu. This information is used to determine a safety margin when purging data from the system. Enter the number of years that boarding information should be retained.	**Verify**
	Number of months to retain – Reminder letters	Setting the purge information here will take effect only when the **Purge Data** option is selected in the **Tools** menu. This information is used to determine a safety margin when purging data from the system. Enter the number of months that reminder letters should be retained when data is purged.	**Verify**
	Number of months to retain – Reminder calls	Setting the purge information here will take effect only when the **Purge Data** option is selected in the **Tools** menu. This information is used to determine a safety margin when purging data from the system. Enter the number of months that reminder calls should be retained when data is purged.	**Verify**

Figure DD

(Controls > Defaults > Practice and Workstation > Purging)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
View a snippet online demonstration **Statement Print Options** *See figure EE*	Print practice address on statement	Select this check box to print the practice address on statements. If you are using letterhead or preprinted paper, clear the check box.	**Verify**
	Print practice logo on statement	Select this check box to print the practice logo on statements. If you are using letterhead or preprinted paper, clear the check box.	**Verify**
	Practice Address	To adjust the placement of the practice address on the statement when using window envelopes, click the **Practice Address** box and use the arrow keys on your keyboard to adjust the location.	**Verify**
	Practice Logo	To adjust the placement of the practice logo on the statement when using window envelopes, click the **Practice Logo** box and use the arrow keys on your keyboard to adjust the location.	**Verify**
	Client Address	To adjust the placement of the client address on the statement when using window envelopes, click the **Client Address** box and use the arrow keys on your keyboard to adjust the location.	**Verify**
	Test Page	Click the **Test Page** button to print a test page.	**Verify**
	Print Primary Practice Address	Select this check box to print the practice's primary address on the client's statement.	**Verify**
	Print Client Home Practice Address	Print the client's home practice address on the client's statement.	**Verify**
	Reset to default position	Reset the practice and client address to the default position.	**Verify**
Toolbar *See figure FF*	Default patient icon	Select the icon you want to use for your patient icon. Options include Cat, Dog, Horse.	**Verify**
	Cornerstone Toolbar Icons (Visible check box)	Select the icons to display in the Toolbar on the main Cornerstone window. These defaults can be changed for individual users within the staff defaults.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	

Figure EE

(Controls > Defaults > Practice and Workstation > Statement Print Options)

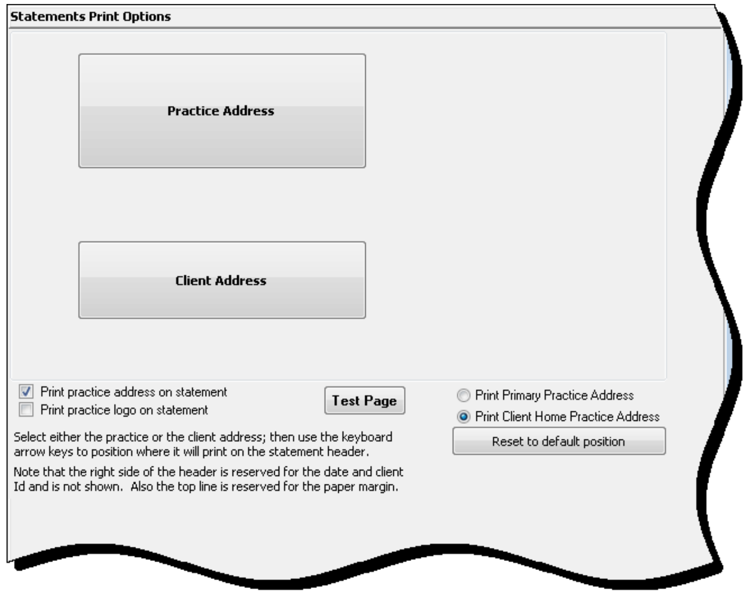
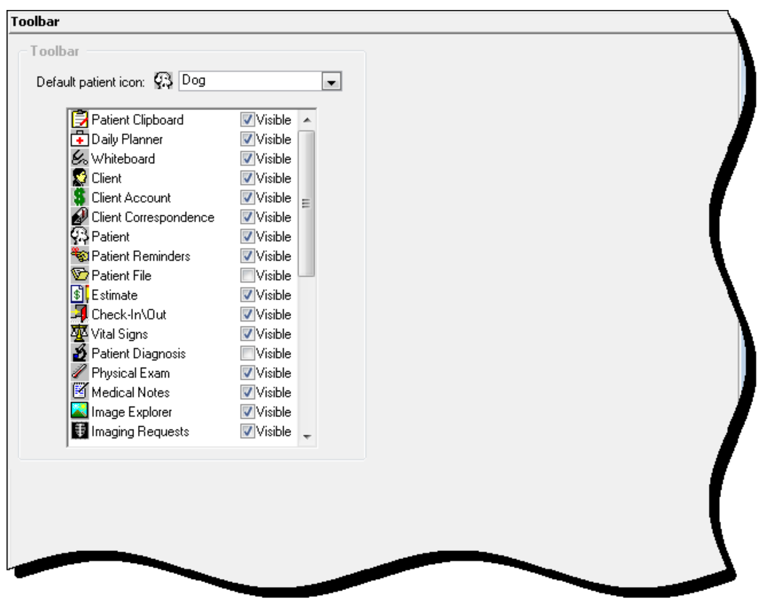


Figure FF

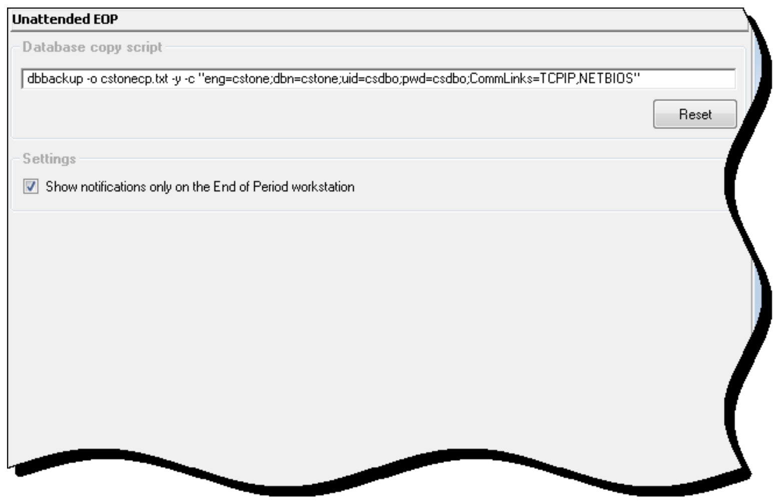
(Controls > Defaults > Practice and Workstation > Toolbar)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Unattended EOP *See figure GG*	Database copy script	If necessary, with assistance from Cornerstone software support, make changes to the database copy script.	**Verify**
	Reset	Press the **Reset** button to change the copy script to the original default.	
	Settings – Show notifications on the End of Day workstation	Select this check box to display any warnings or errors that are encountered during end of period on only your end of period workstation. If this option is not selected, warnings or errors will display on all workstations.	

Figure GG

(Controls > Defaults > Practice and Workstation > Unattended EOP)



Controls > Defaults > Practice and Workstation

Menu Access	Default	Description	Action & Decision
Unattended EOP > Unattended EOD *See figure HH*	When	Select an option for how often unattended End of Day processing will be run. Enter date and time information when needed.	**Verify**
	What	Select one or both of the following options: • Make a copy of the database • Run End of Day If you choose to make a copy of the database, the database will be copied to both the *dailycopy* folder on the end of period workstation and the *dailycc* shared folder on the server. These copies of the database are overwritten each time a new copy is made. This process does not replace your normal backup procedure.	
	Print the default daily reports	Select this check box to automatically print your daily reports.	
	Current end of day notification	Displays the current message. If the unattended EOD process was unsuccessful, messages will display every 30 minutes in a notification window. If you do not want this notification message to display, select the **Suppress this notification** check box.	
	Current database copy notification	Displays the current message. If the unattended EOD process was unsuccessful, messages will display every 30 minutes in a notification window. If you do not want this notification message to display, select the **Suppress this notification** check box.	
	Current database carbon copy notification	Displays the current message. If the unattended EOD process was unsuccessful, messages will display every 30 minutes in a notification window. If you do not want this notification message to display, select the **Suppress this notification** check box.	

Figure HH

(Controls > Defaults > Practice and Workstation > Unattended EOP > Unattended EOD)

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Unattended EOP > Unattended EOM *See figure II*	When	Select an option for how often unattended End of Month processing will be run. Enter date and time information when needed.	**Verify**
	What	Select one or both of the following options: • Make a copy of the database • Run End of Month If you choose to make a copy of the database, the database will be copied to both the *dailycopy\monthly* folder on the end of period workstation and the *dailycc\monthly* shared folder on the server. These copies of the database are overwritten each time a new copy is made. This process does not replace your normal backup procedure.	
	Print the default daily reports	Select this check box to automatically print your daily reports.	
	Current end of month notification	Displays the current message. If the unattended EOM process was unsuccessful, messages will display every 30 minutes in a notification window. If you do not want this notification message to display, select the **Suppress this notification** check box.	
	Current database copy notification	Displays the current message. If the unattended EOM process was unsuccessful, messages will display every 30 minutes in a notification window. If you do not want this notification message to display, select the **Suppress this notification** check box.	
	Current database carbon copy notification	Displays the current message. If the unattended EOM process was unsuccessful, messages will display every 30 minutes in a notification window. If you do not want this notification message to display, select the **Suppress this notification** check box.	

Figure II

(Controls > Defaults > Practice and Workstation > Unattended EOP > Unattended EOM)

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Vaccination Bookmarks *See figure JJ*	Vaccinations to appear on the document	Select the vaccinations that you want to appear on your documents, such as vaccination certificates, health certificates, and other similar documents.	**Verify**
	Vaccination line pattern	Select the buttons in the order in which you want the information to print on your document. The pattern will appear in the box below.	**Verify**
Web Links *See figure KK*	Web Address	Enter a web address that will display the custom description in the **Web Links** menu. Repeat to store up to four addresses.	**Verify**
	Description	The description of the web address that displays in the **Web Links** menu. Repeat to store up to four addresses.	**Verify**

Figure JJ

(Controls > Defaults > Practice and Workstation > Vaccination Bookmarks)

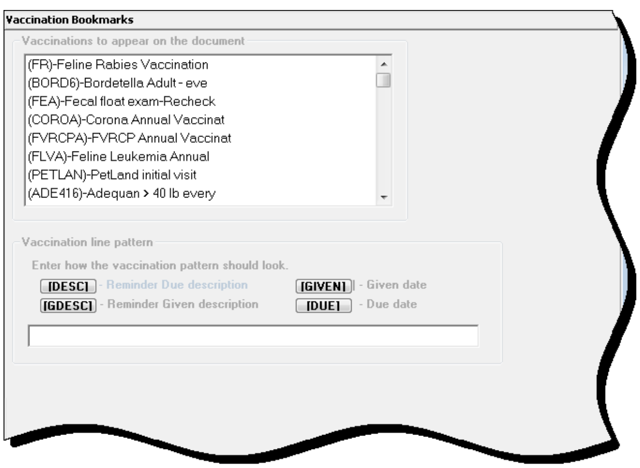
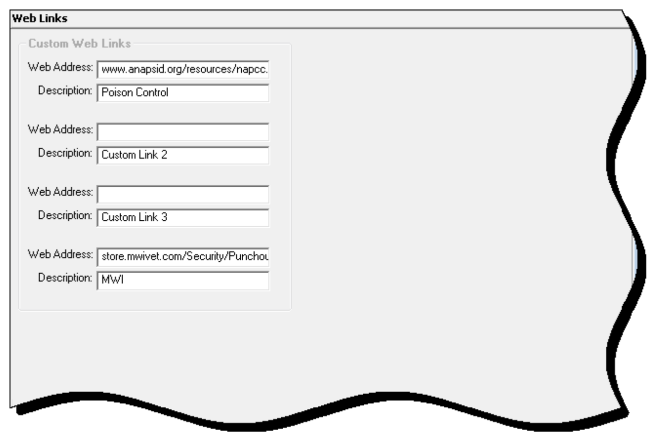


Figure KK

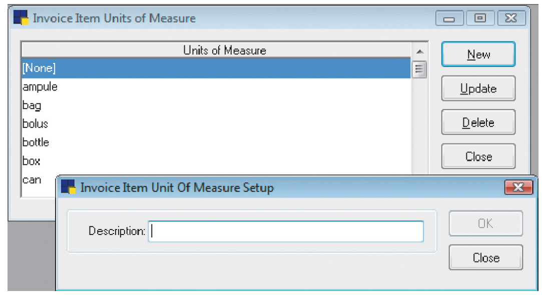
(Controls > Defaults > Practice and Workstation > Web Links)



<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Controls > Units Of Measure</td><td>

Invoice Item Units of Measure window

Cornerstone comes with either a built-in list of common units of measure (UOM) or those that were used by your previous practice management software. New units can be added. If a unit is not currently used by an item, it can be deleted. Set up the most common units of measure for invoice items.



</td><td>Verify</td></tr>
<tr><td>Controls > Problems > Problem Categories</td><td>

Problem Categories window

The Problem List provides a list of common medical ailments and issues. This list can be used when entering medical notes on the patient record. You must set up problem categories before setting up the Problem List.

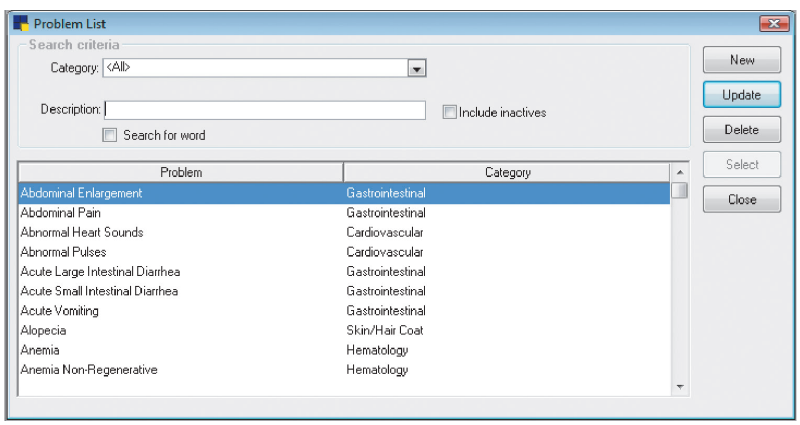
</td><td>Verify</td></tr>
<tr><td>Controls > Problems > Problem List</td><td>

Problem List window

Cornerstone provides a list of problems that can be selected as the presenting problem for a particular visit or used to track problems for the patient over the long term.

Used in the following manner throughout Cornerstone:

- Used to enter problems (pre-diagnosis) in patient's medical history.
- Can be used in medical note templates.

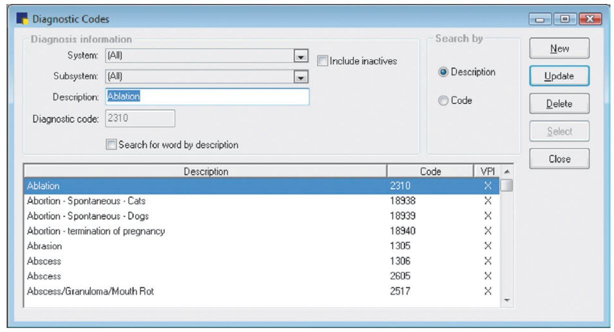


</td><td>Verify</td></tr>
</table>

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Lists > Diagnostic Codes</td><td>

Diagnostic Codes window

Cornerstone provides a list of diagnoses that can be selected as tentative, ruled out, or final diagnoses for a patient. Diagnosis can be used for various reports, to set up compliance assessment and/or within the Patient Advisor* exam module.



Used in the following manner throughout Cornerstone:

- View on a patient's Diagnosis (Dx) tab on the Patient Clipboard
- Patient Diagnosis Report
- Diagnostic Code Report
- To set up Compliance Assessment Tool compliance controls within Patient Advisor (if Patient Advisor has been purchased) to set diagnostic and treatment plans
- Medical notes

  Note: You can link documents to diagnostic codes so that they automatically print when the diagnosis is entered in a medical note. You can set this up from Links > Diagnostic Codes > Update.
- Document templates

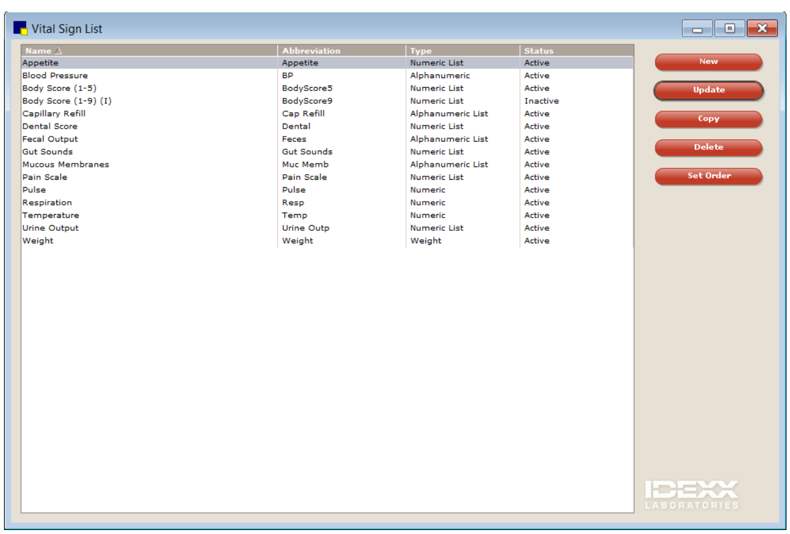
</td><td>Verify</td></tr>
<tr><td>Lists > Vital Signs/Weight</td><td>

Vital Sign List window

Cornerstone provides a list of vital signs that your practice can use. With the exception of weight, all vital signs are inactive upon installation of Cornerstone.

To activate an item, double-click it to open the Vital Sign Setup window and clear the Inactive check box. If the vital sign you are activating is an alphanumeric or numeric list, you must associate one or more species with the list; select the list and then select each species to link.

You can also edit items and order them in the way your practice uses them.

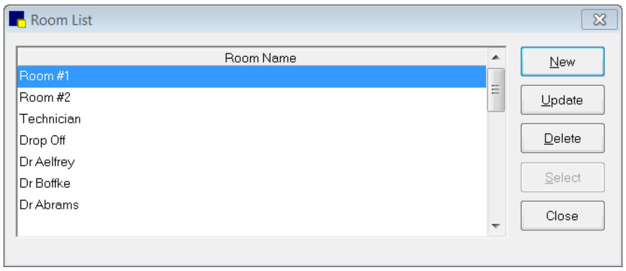


</td><td>Set up</td></tr>
</table>

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Lists > Room</td><td>

Room List window

Used to designate rooms within the practice. Used in many modules, including Appointment Scheduler and Electronic Whiteboard.



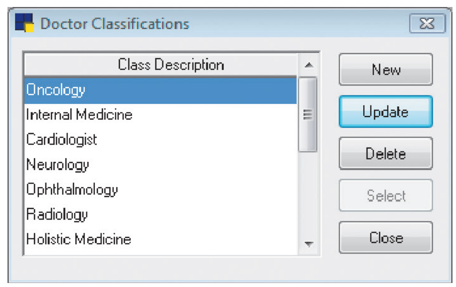
</td><td>Set up</td></tr>
<tr><td>Lists > Referrals > Classification</td><td>

Doctor Classifications window

Used to classify the type of hospital that referred the patient.

Used in the following manner throughout Cornerstone:

- When setting up the referring doctors, select from this classification list

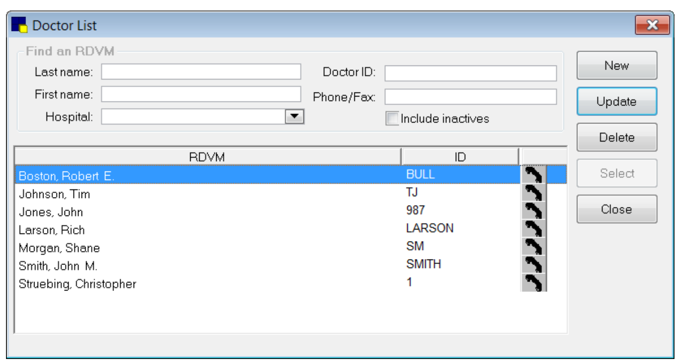


</td><td>Verify</td></tr>
<tr><td>Lists > Referrals > Doctors</td><td>

Doctor List window

Used to record the doctor who referred the patient. Doctors must be associated with hospitals.

Click the phone icon to open the RDVM Phone Information window, where you can access all personal and hospital-affiliated phone/fax numbers for the RDVM. The primary contact number for both personal and hospital numbers is indicated.



Used in the following manner throughout Cornerstone:

- When setting up the referring doctors, select from this classification list
- Referral Doctor Master Report

</td><td>Set up</td></tr>
</table>

<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Lists > Referrals > Hospitals</td><td>

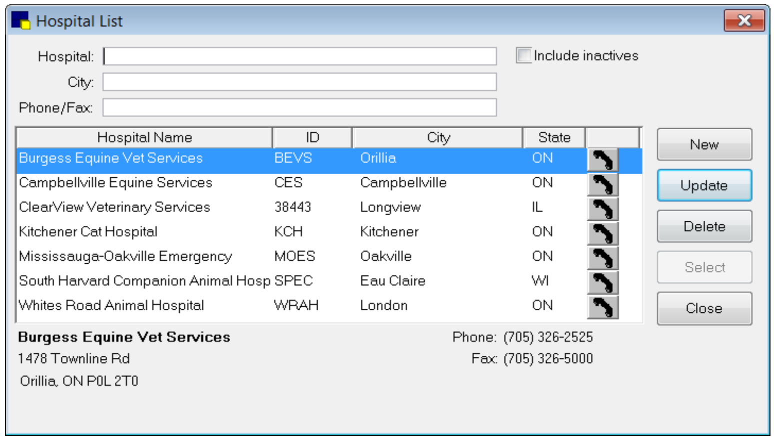
Hospital List window

Used to record the hospital from which the patient was referred.

Click the phone icon to open the Hospital Phone Information window.

Used in the following manner throughout Cornerstone:

- When setting up the referring doctors, select from this hospital list. Use the text boxes at the top of the window to filter the list.
- Referral Hospital Master Report



</td><td>Verify</td></tr>
<tr><td>Lists > Patient Advisor > System Templates > New</td><td>

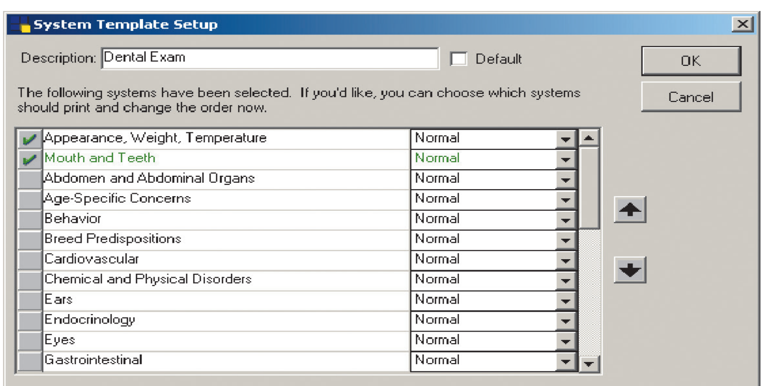
System Template Setup window

In the **Description** box, enter a descriptive name for the system template.

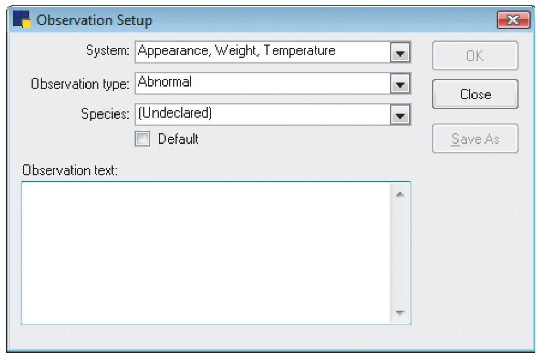
Select the **Default** check box to set this as the default template.

The following setup selections are optional:

- Select gray box to left of a system to include a body system on the template.
- Select default observation status: **Normal**, **Abnormal**, or **Did Not Examine**.
- Use the arrows to arrange systems in the order they will appear on the physical exam and the Pet Health Report Card.



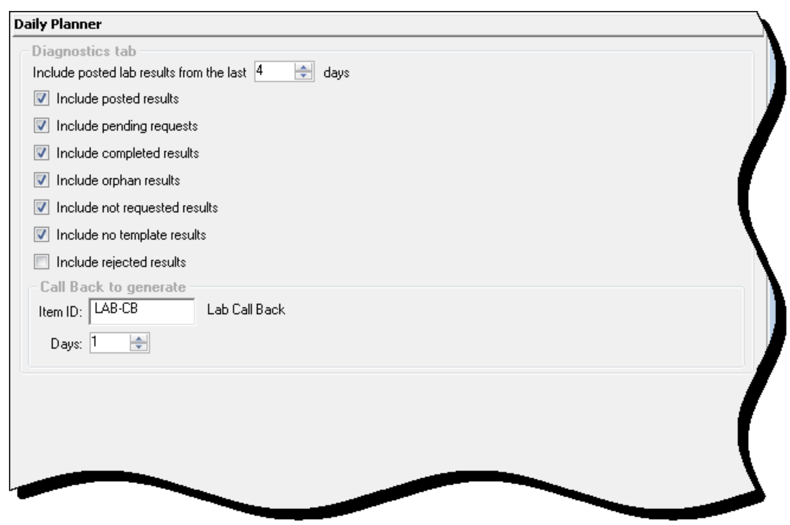
</td><td>Verify</td></tr>
</table>

Menu Access	Description	Action & Decision
Lists > Patient Advisor > Patient Advisor Setup > New (System)	**System Setup window** In the Patient Advisor Setup window, click in the left pane, and then click **New**. In the System Setup window, in the **Description** box, type a name for the system. Select the **Vital Sign System** check box if applicable.	**Verify**
Lists > Patient Advisor > Patient Advisor Setup > New (Observation)	**Observation Setup window** In the Patient Advisor Setup window, click the **+** to the left of the body system, click **Observations**, and then click **New**. In the Observation Setup window, select the system, observation type, and species. If this is the default observation, select the **Default** check box. Enter any observation text in the box. 	**Verify**
List > Partnerships	**Partnership List window** The Split Billing feature uses the percentages in the partnership records to split bills. When a partnership is listed as the owner of a patient, the percentage of ownership must equal 100%.	**Set up**
Lists > Call Back Notes	**Call Back Notes window** Callback notes are used both to provide additional details to staff members making callbacks as well as saving keystrokes when charting the results of these calls. Cornerstone provides a list of notes that can be edited and/or expanded.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Daily Planner *See figure MM*	Diagnostics tab	Select the **Include posted lab results from the last ___ days** check box and enter the number of days for including posted results on the Diagnostics tab of the Daily Planner. Select each check box to include those results: • Include posted results • Include pending requests • Include completed results • Include orphan results • Include not requested results • Include no template results • Include rejected results	**Verify**
	Call Back to generate	• Enter the default invoice item ID you have set up for laboratory call backs. • Enter the default number of days before a laboratory callback is due.	**Verify**

Figure MM

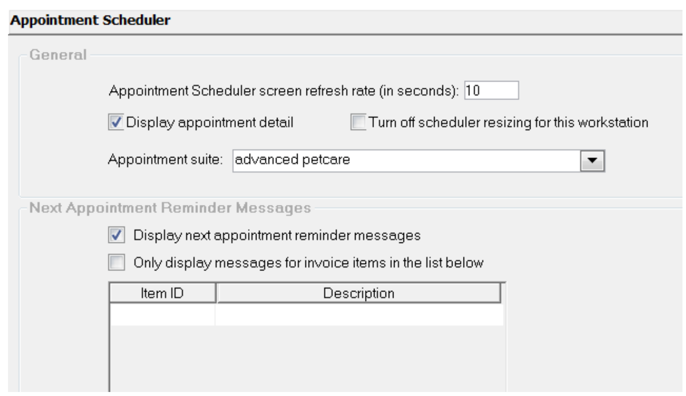
(Controls > Defaults > Practice and Workstation > Daily Planner)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Appointment Scheduler *See figure NN*	Set the Appointment Scheduler screen refresh rate (in seconds): ____.	Type the number of seconds for refreshing the Appointment Scheduler window.	**Verify**
	Display appointment detail	Select this check box to display appointment detail on the main Appointment Scheduler window when you move the mouse over an appointment slot.	**Verify**
	Turn off scheduler resizing for this workstation	Select this check box if you do not want the Appointment Scheduler window to resize based on the workstation window.	**Verify**
	Appointment suite	Select the appointment suite to display by default when accessing the Schedule for Today window. The default will display unless a different suite is assigned to the staff member currently logged in.	**Verify**
	Display next appointment message reminders	Select this check box to display next appointment reminder messages when clients check out.	**Verify**
	Only display messages for invoice items in the list below	If displaying next appointment reminder messages, select this check box to specify for which invoice items messages should be displayed. Then, enter item IDs in the list.	**Verify**

Figure NN

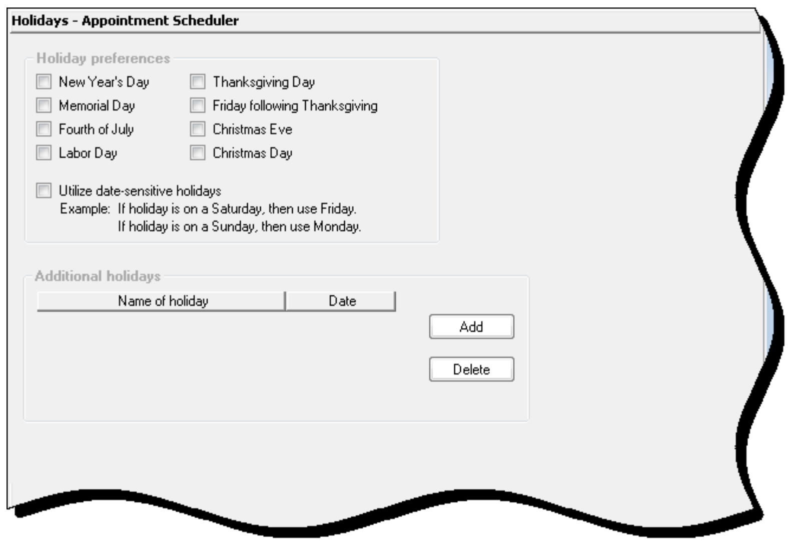
(Controls > Defaults > Practice and Workstation > Appointment Scheduler)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Holidays – Appointment Scheduler *See figure OO*	Holiday preferences	Select the check box for each holiday that the practice will be closed: **New Year's Day, Memorial Day, Fourth of July, Labor Day, Thanksgiving day, Friday following Thanksgiving, Christmas Eve**, and **Christmas Day**. Select the **Utilized date-sensitive holidays** check box to close the clinic on a Friday if the holiday is on a Saturday or close the clinic on a Monday if the holiday is on a Sunday.	**Verify**
	Additional holidays	To add more holidays that the clinic will be closed, click the **Add** button. Then, in the **Name of holiday** field, type the name of the holiday. In the **Date** field, enter the date. To remove a holiday, click **Delete**.	**Verify**

Figure OO

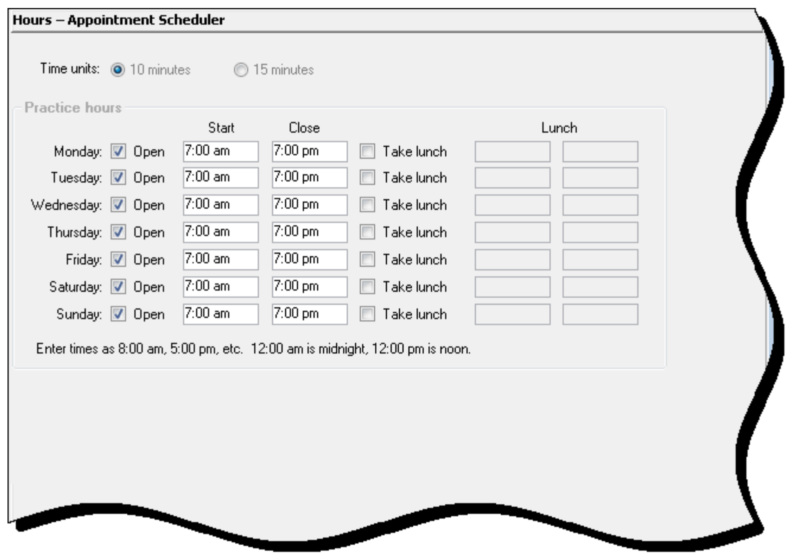
(Controls > Defaults > Practice and Workstation > Appointment Scheduler > Holidays – Appointment Scheduler)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Hours – Appointment Scheduler *See figure PP*	Time units	Select **10 minutes** or **15 minutes** as the default number of minutes each appointment should be scheduled.	**Verify**
	Practice hours	Select the check box for each day the practice will be open. In the **Start** and **Close** boxes, type the applicable time. Select the **Take lunch** check If your practice closes for lunch, and then enter the start and end times of the lunch period, making sure to include AM or PM.	**Verify**

Figure PP

(Controls > Defaults > Practice and Workstation > Appointment Scheduler > Hours – Appointment Scheduler)

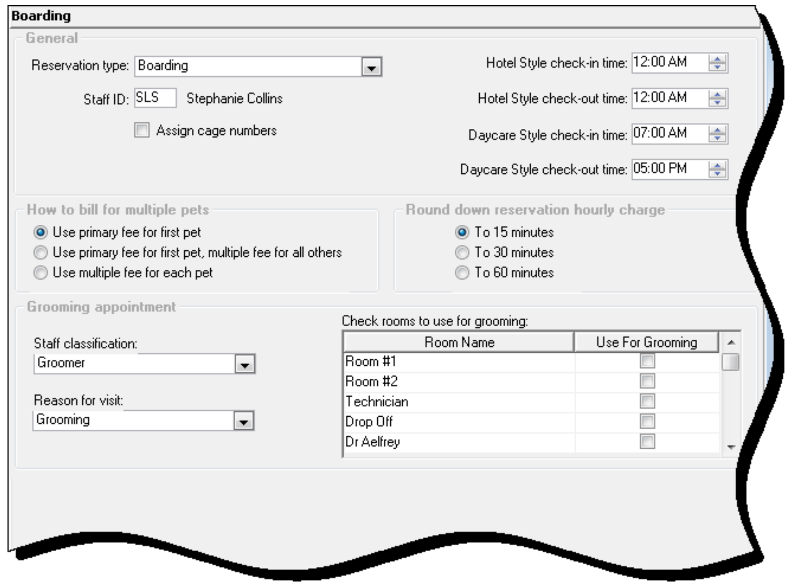


Menu Access	Default	Description	Action & Decision
Boarding *See figure QQ*	General	• From the **Reservation type** list, select the type of boarding reservation. • In the **Staff ID** box, enter the default staff ID for boarding reservations. • Select the **Assign cage numbers** check box to require cage assignments for boarding reservations. • Enter default check-in/checkout times in the applicable boxes.	**Verify**
	How to bill for multiple pets	Select one of the following options for how to bill for multiple pets: **Use primary fee for first pet**; **Use primary fee for first pet**; **multiple fee for all others**; or **Use multiple fee for each pet**.	**Verify**
	Round down reservation hourly charge	Select one of the following options for how to round down reservation hourly charge: **To 15 minutes**, **To 30 minutes**, or **To 60 minutes**.	**Verify**
	Grooming appointment	• From the Staff classification list, select a default staff classification for the grooming appointments. • In the **Check rooms to use for grooming** table, select the **Use for Grooming** check box next to each room used for grooming appointments.	**Verify**

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	

Figure QQ

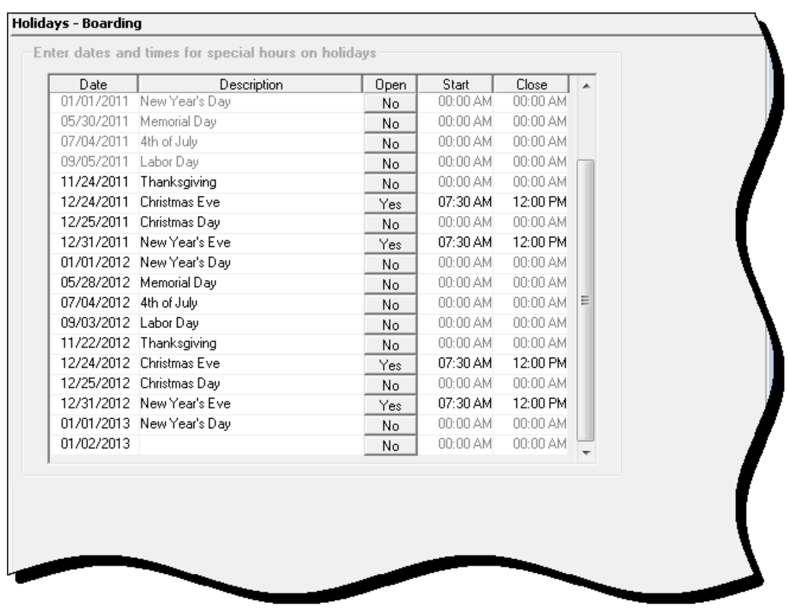
(Controls > Defaults > Practice and Workstation > Boarding)



Menu Access	Default	Description	Action & Decision
Holiday – Boarding *See figure RR*	Enter dates and times for special hours on holidays	In the **Date** field, type the date of the boarding holiday. In the **Description** field, type a description for the holiday. In the **Open** column, click **Yes** or **No** to indicate if the practice is open or closed. If the practice will be open, in the **Start** and **Close** fields, type the opening and closing times.	**Verify**

Figure RR

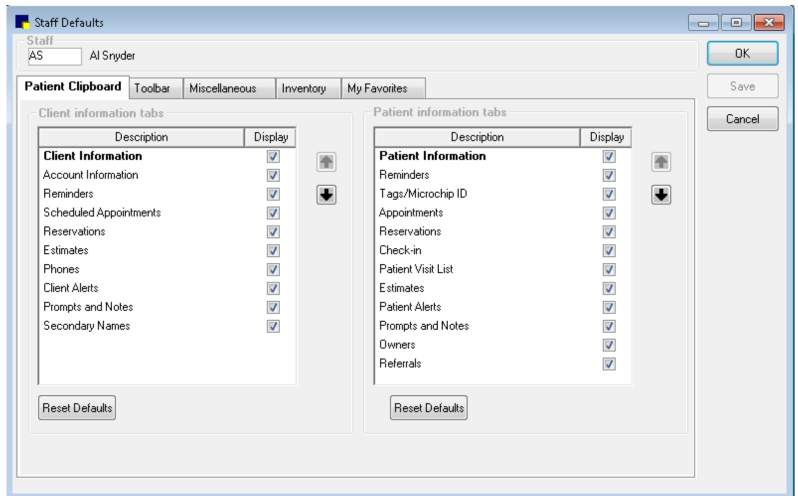
(Controls > Defaults > Practice and Workstation > Boarding > Holiday – Boarding)



Controls > Defaults > Staff			Action & Decision
Menu Access	**Default**	**Description**	
Controls > Defaults > Staff > Patient Clipboard tab *See figure SS*	Staff	This allows the practice administrator to determine, based on staff ID or login, what is shown on the **Client information** and **Patient information** tabs on the Patient Clipboard window. Enter the staff ID for whom you want to set default settings.	**Verify**
	Client information tabs Patient information tabs	In the **Display** column, select the check box for each item to display for this staff member. Use the arrows to order the items. Click **Reset Defaults** to reset the defaults to the original settings.	**Verify**

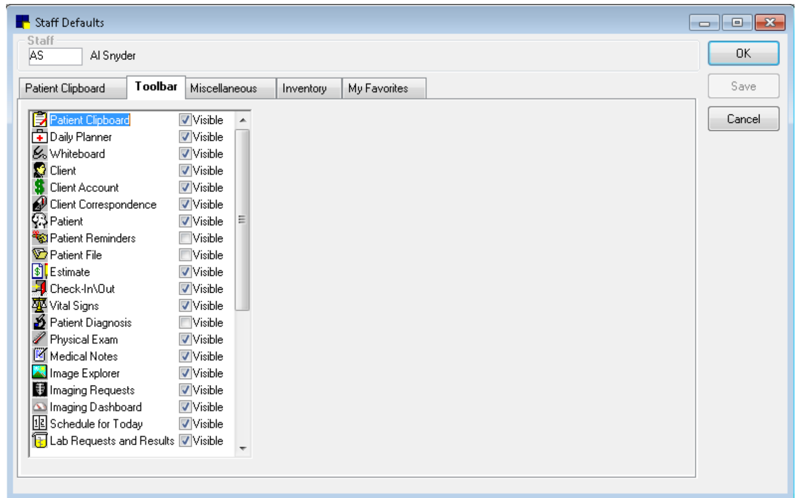
Figure SS

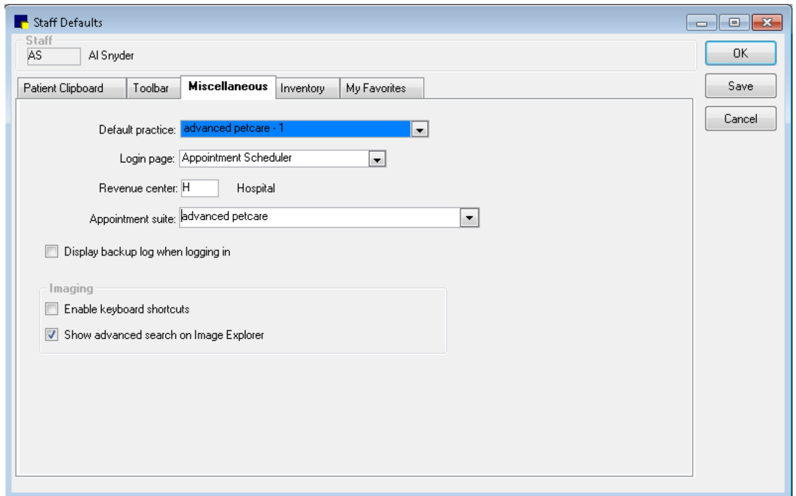
(Controls > Defaults > Staff > Patient Clipboard)



Controls > Defaults > Staff > Toolbar tab *See figure TT*	Staff ID	This allows the practice administrator to determine, based on staff ID or login, which toolbar buttons are shown on the toolbar. Enter the staff ID for whom you want to set default settings.	**Verify**
	Toolbar	Select the **Visible** check box next to each toolbar button to display for this staff member.	**Verify**

<table>
<tr><th colspan="3">Controls > Defaults > Staff</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td colspan="2">Figure TT

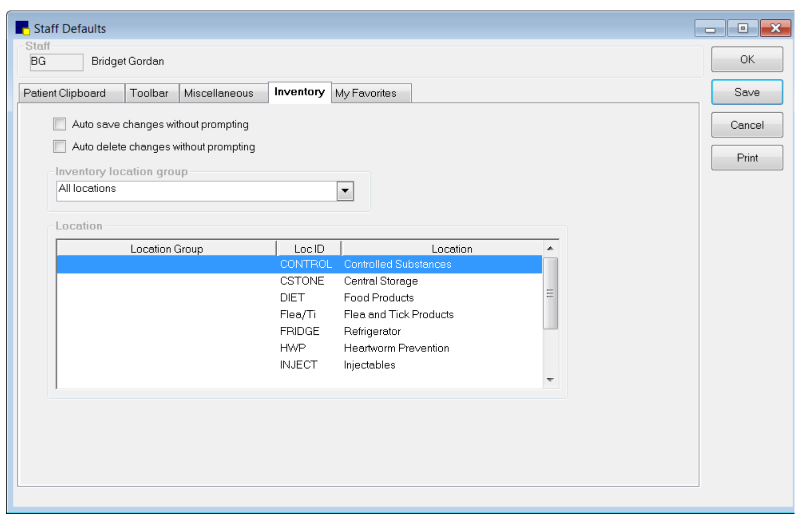
(Controls > Defaults > Staff > Toolbar)</td><td colspan="2">
</td></tr>
<tr><td rowspan="2">Controls > Defaults > Staff > Miscellaneous tab
See figure UU</td><td>Staff</td><td>This allows the practice administrator to determine, based on staff ID or login, the miscellaneous settings for the staff member.
Enter the staff ID for whom you want to set default settings.</td><td>Verify</td></tr>
<tr><td>Miscellaneous tab</td><td><table>
<tr><td>Default practice</td><td>If your practice has multiple locations, select the default practice for this staff member.</td></tr>
<tr><td>Login page</td><td>Select the default window that opens for this staff member upon login.</td></tr>
<tr><td>Revenue center</td><td>Enter the default revenue center for this staff member.</td></tr>
<tr><td>Appointment suite</td><td>Select the default appointment suite used in the Appointment Scheduler for this staff member.</td></tr>
<tr><td>Display backup log when logging in</td><td>Select this check box if you want to display the backup log when this staff member logs in.</td></tr>
<tr><td>Imaging - Enable keyboard shortcuts</td><td>Select this check box to allow this staff member to use keyboard shortcuts.</td></tr>
<tr><td>Imaging - Show advanced search on Image Explorer</td><td>Select this check box to make advance search in Image Explorer the default search type for this staff member.</td></tr>
</table></td><td>Verify</td></tr>
</table>

Controls > Defaults > Staff			Action & Decision
Menu Access	**Default**	**Description**	
Figure UU **(Controls > Defaults > Staff > Miscellaneous tab)**			

<table>
<tr><th colspan="3">Controls > Defaults > Staff</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="2">Controls > Defaults > Staff > Inventory tab
See figure VV</td><td>Staff</td><td>This allows the practice administrator to determine, based on staff ID or login, the inventory settings for the staff member.
Enter the staff ID for whom you want to set default settings.</td><td>Verify</td></tr>
<tr><td>Inventory tab</td><td>
<table>
<tr><td>Auto save changes without prompting</td><td>If you want a "Do you want to save?" confirmation prompt to appear if the staff member switches windows without saving inventory changes first, clear the check box (recommended).
If you want the program to automatically save inventory changes the staff member makes without displaying a confirmation prompt, select the check box.</td></tr>
<tr><td>Auto delete changes without prompting</td><td>If you want a "Do you want to delete?" confirmation prompt to appear for this staff member when Delete button is clicked on any inventory window, clear the check box (recommended).
If you want the program to automatically delete within inventory (when the Delete button is clicked on any inventory window) without displaying a confirmation prompt for this staff member, select the check box.</td></tr>
<tr><td>Inventory location group
Location</td><td>If using a multi-location inventory configuration, select the default location for inventory depletion for this staff member from the list. The Location table displays information about the selected location.</td></tr>
</table>
</td><td>Verify</td></tr>
</table>

Figure VV

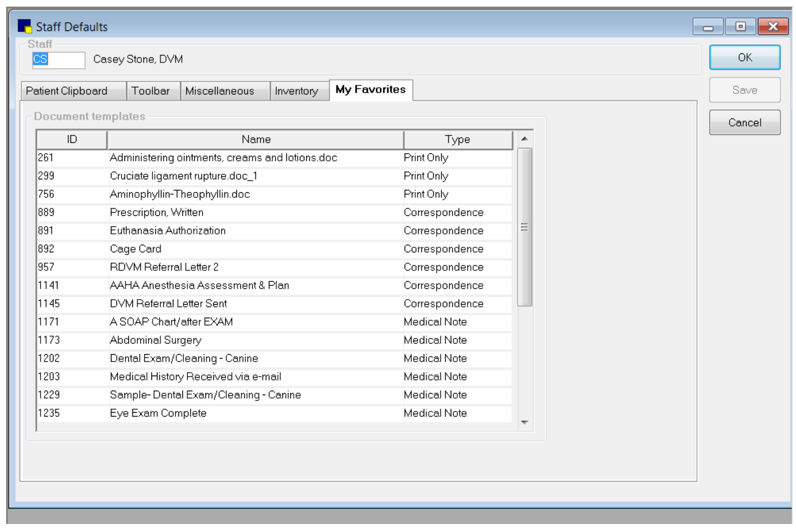
(Controls > Defaults > Staff > Inventory tab)



Controls > Defaults > Staff			Action & Decision
Menu Access	**Default**	**Description**	
Controls > Defaults > Staff > My Favorites tab *See figure WW*	Staff	This allows the practice administrator to determine, based on staff ID or login, documents templates that appear in the staff member's Favorites list on the Document Template List window. Enter the staff ID for whom you want to set default settings.	**Verify**
	My Favorites tab	To add a document template to the list, double-click in the blank row at the bottom of the list or press F2 to display the Document Template List and select the template to add to the favorites list. To remove a document template from the list, click on the template's ID in the ID column and then press CTRL+D.	**Set up**

Figure WW

(Controls > Defaults > Staff > My Favorites tab)



<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Lists >
Practice >
Update</td><td>

Practice Information window—Login/Password Management

Set up login and password information for the following features. When you select a feature, the fields required for set up appear.

For more information about these features, including prerequisites, see the Cornerstone Help. To access the Help for this window, press F1 while the window is open.

<table>
<tr><td>Antech Reference Lab Results</td><td> To set up the Antech® Diagnostics module: If you already have Antech Diagnostics module set up in Cornerstone, click Apply Primary Practice Settings. The account information boxes are automatically completed. If you don't have existing Antech account information, enter the information provided by Antech when you set up your account with. Click Test. Then, when the Login Settings Passed message appears, click OK. </td></tr>
<tr><td>Communications – Email</td><td> To set up email service: Select your email service; you can use your desktop email client or an SMTP (web-based) email service. If you want to use SMTP mail, you must set it up in the Imaging Configuration window. Click the link or go to Controls > Defaults > Imaging and select Email in the menu. Then, enter your email account information. </td></tr>
<tr><td>Communications – Fax</td><td> To activate IDEXX Faxing service: Select the Use IDEXX Faxing Service check box. Click Accept in the terms and conditions of use window. Upon successful activation, the system will log the user who enrolled the IDEXX Faxing Service. In the Practice Information window, the name, time/date stamp, and a link to the IDEXX Faxing terms and conditions are displayed. Note that all practices in a Multi-Location/Single Database configuration must accept the terms and conditions. </td></tr>
<tr><td>Vendor – MWI Veterinary Supply</td><td> To activate IDEXX SmartOrder* electronic inventory ordering: From the Associated Cornerstone Vendor list, select the practice-specific vendor to use for this service. In the Customer Number box, type your practice's MWI® customer number. Select the Enable Online Ordering check box. Click Accept in the terms and conditions of use window, and then click OK when notified that the activation was successful. Click Test to verify that you have a working Internet connection and valid login. </td></tr>
</table>

</td><td>Set up</td></tr>
</table>

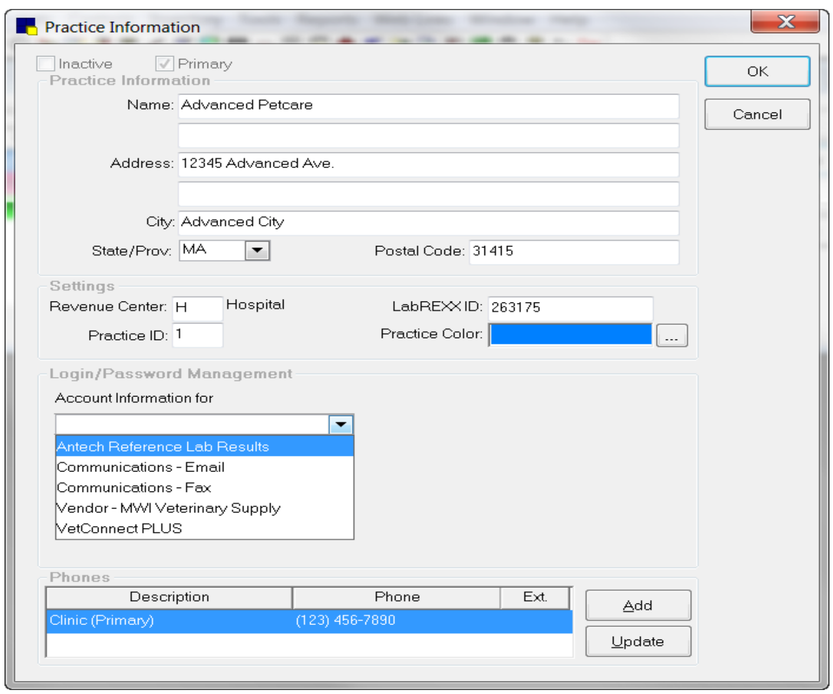
<table>
<tr><th>Menu Access</th><th>Description</th><th>Action & Decision</th></tr>
<tr><td>Lists >
Practice >
Update
(continued)</td><td>
<table>
<tr><td>VetConnect* PLUS</td><td>To activate VetConnect PLUS:

If you are a new IDEXX Reference Laboratories user, select the VetConnect option, enter your practice’s VetConnect administrator user name and password, and then click Submit to Activate VetConnect PLUS.
OR
If you are an existing IDEXX Reference Laboratories user, the VCAgent option should already be selected and your VetConnect user name and password should be completed.

Click Submit to Activate VetConnect PLUS.

Read the agreement, and then click Accept. A message states that IDEXX Reference Laboratories historical data will be uploaded. Click Next.

IDEXX VetLab* Station only: A message giving you the option to print instructions on uploading data displays. Click Yes to open the printable message or No to continue. Click Finish. A message states that activation is complete and that data upload will continue. Close the message window.

After you activate VetConnect PLUS from within Cornerstone, activate VetConnect PLUS from your IDEXX VetLab* Station (if applicable).</td></tr>
</table>


</td><td>Set up</td></tr>
</table>

Electronic Whiteboard Default Settings

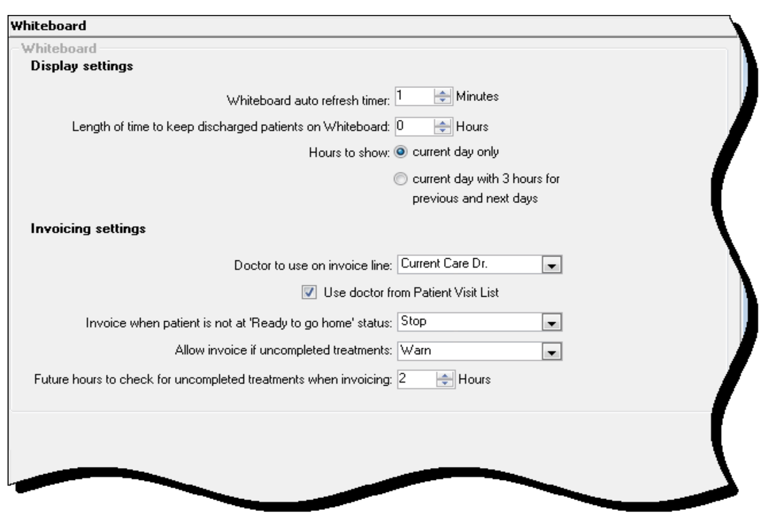
The following default settings are important for using Electronic Whiteboard.

Menu Access	Description	Action & Decision
List > Electronic Whiteboard > Categories	View a snippet online demonstration Categories are used to identify types of treatments that will be administered to patients while in the hospital. They will help your staff determine who needs to perform a service and/or the schedule for these treatments. Verify that existing treatment categories are correct. Set up new categories if necessary.	**Verify**
List > Electronic Whiteboard > Areas	View a snippet online demonstration These are areas within the hospital where patients might be receiving treatment. Verify existing areas and set up new areas as needed.	**Verify**
List > Electronic Whiteboard > Frequencies	View a snippet online demonstration Treatment frequencies are used to determine how often and when a treatment is needed. Verify that existing treatment frequencies are correct. Add new frequencies as needed. You can also change the order of frequencies so that those you use most often are at the top of the list.	**Verify**
Lists > Electronic Whiteboard > Alerts	View a snippet online demonstration Create a list of commonly used alerts for hospitalized patients that will be displayed on the Electronic Whiteboard . You can also type alerts for each patient at the time of use; these alerts are not saved to the Whiteboard Alerts List.	
LIsts > Patient Hospital Status	View a snippet online demonstration Used to designate a patient's status within the hospital.	**Verify**
Lists > Ward/Loc	View a snippet online demonstration Used to designate the physical location of the patient.	

Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
View a snippet online demonstration **Whiteboard** *See figure LL*	Whiteboard auto refresh timer ____ Minutes	Enter a number (in minutes) for how often the Whiteboard should automatically refresh.	**Verify**
	Length of time to keep discharged patients on Whiteboard ____ Hours	Enter the number of time (in hours) to keep patients on the Whiteboard.	**Verify**
	Hours to show	Select one of the following options for how many hours to show on the Whiteboard: • Current day only • Current day with 3 hours for previous and next days	**Verify**
	Doctor to use on invoice line	Select a default doctor to use on the invoice line. Options are **Supervising Dr., Current Care Dr.**, or **Who Performed**. The supervising and current care doctors are determined at the time orders are written. Performing staff is determined at the time items are marked completed.	**Verify**
	Use doctor from Patient Visit List	Select this check box if you want the staff from the Patient Visit List invoice item lines to transfer as the doctor for the patient orders.	**Verify**
	Invoice when patient is not at “Ready to go home” status	Determines under which circumstances a staff member is allowed to invoice a client for a patient who is still in the “Not ready to go home” status on the Whiteboard. Options are **Allow**, **Manager Override**, **Stop**, and **Warn**.	**Verify**
	Allow invoice if uncompleted treatments	Determines under which circumstances a staff member is able to invoice a client when a patient has treatment on the Whiteboard that has not been marked complete. Options are **Allow**, **Manager Override**, **Stop**, and **Warn**.	**Verify**
	Future hours to check for uncompleted treatments when invoicing ____ Hours	Enter the number of hours in the future to check for uncompleted treatments when invoicing.	**Select**

Figure LL

(Controls > Defaults > Practice and Workstation > Whiteboard)



Cornerstone* Imaging Default Settings

Cornerstone* Imaging contains standard imaging functionality to import, view, and enhance images.

This section covers Cornerstone Imaging (the imaging functionality that is included with Cornerstone software).

- For information on setting defaults for the DICOM® Imaging module, see “DICOM® Imaging Default Settings” starting on page 89.
- For information on the IDEXX-PACS* module, see “IDEXX PACS* Default Settings” starting on page 95.

For information on Practice and Workstation defaults for imaging (pet picture compression, image storage, and IDEXX SmartLink* Digital Imaging preferences for image requests), see page 41 in this guide.

To access the Imaging Configuration window, from the menu bar, go to **Controls > Defaults > Imaging**. Then, click the item to set up in the navigation pane on the left. The items in the navigation pane vary, depending on what you have installed.

As you work through the settings, click **Apply** to save your changes without closing the Imaging Configuration window, or click **Save** to save your changes and close the window.

<table>
<tr><th colspan="3">Controls > Defaults > Imaging</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th colspan="2">Description</th></tr>
<tr><td rowspan="4">Archive</td><td colspan="2">Archiving refers to moving images from your computer to another storage location. Archiving is usually not necessary; however, if you choose to archive images, you can set up the software to alert you when it is time to archive. You will also be prompted to archive images when your Images folder nears its storage capacity.</td><td rowspan="4">Verify</td></tr>
<tr><td>Enable archive alerts</td><td>Select this check box to activate archive alerts.</td></tr>
<tr><td>Alert Frequency</td><td>Select the Images option to be alerted when a specific number of images has accumulated, and then type the number of images in the box.
Select the Days option to be alerted when a specific number of days has passed since the last alert, and then type the number of days in the box.</td></tr>
<tr><td>Archive Location</td><td>Specify the location where you want to store archived files.</td></tr>
</table>

Controls > Defaults > Imaging

Menu Access	Description	Action & Decision
Email *Click the System tab or the staff member tab to update the email settings.*	If you set up an email account for a staff member, that account will be used for emails sent from the Image Explorer, Image Viewer, or the Email tab of the Case Actions pane on the Case Details window when that staff member is logged in to Cornerstone. **Note**: If your practice has set the Communications - Email login on the Practice Information window (**Lists > Practice >** select practice and click **Update**) to use Cornerstone Imaging SMTP email settings, these email settings will be used for all communications sent from Cornerstone. If you do not set up an email account for a staff member, the system-level account is used.	**Set up**

Email Account	
SMTP Server Name	Type the name of your email server.
SMTP Port	Type the port number on your computer from which email will be sent.
Enable SSL	Select this check box if your email provider requires the use of SSL (Secure Socket Layer) ports. Many Internet email providers have this requirement.
SMTP User Name	Type the information Cornerstone needs to log in to your server.
SMTP Password	
Email Defaults	
Email Attachment File Type	From the drop-down list, select the type of file for sending images. This can be changed when sending images.
Default Send Email Address	Type the sender email address to use.
Reply Email Address	Type the reply email address to use.

Menu Access	Description	Action & Decision
Imaging		**Set up**

Image Scan Settings	
TWAIN Source	From the drop-down list, select the scanner to use.
Horizontal Resolution	From the drop-down lists, select the horizontal and vertical resolution values in dots per inch (dpi).
Vertical Resolution	
Pixel Type	Select the pixel type from the drop-down list. Options are **Black and White**, **Grayscale**, and **Color**.
Enable TWAIN UI	Select this check box if you want Cornerstone to use your scanner's user interface when you scan an image.
Image Viewer	
Ruler Units	From the drop-down list, select the default unit for the Image Viewer ruler.
Image Capture Settings and DICOM Compression Settings	
Skip these areas and also the **Apply Window/Level to Exported Images** check box in the **Image Export** area. **Note**: If you are installing the DICOM Imaging module or IDEXX-PACS*, you will set up these areas later in this guide.	
Image Export	
Apply Overlays to Exported Images	Select this check box if you want images to include the overlay information displayed in the Image Viewer by default.
Apply Annotations to Exported Images	Select this check box if you want images to include the annotations created in the Image Viewer by default.
Capture Sources	
Add Capture Source	Click the button to add a new line to the Capture Sources list. In the **Description** field, type a description for the device.

<table>
<tr><th colspan="2">Controls > Defaults > Imaging</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Description</th></tr>
<tr><td>Keywords</td><td>When you add an image, keywords (cardiovascular, ears, hematology, etc.) appear in a list box on the Image Details window, allowing you to choose keyword(s) to associate with the image. You can also use keywords to search for images with the Advanced Search tab on the Image Explorer window.

For your convenience, a number of keywords have been preloaded on your system. You can add, delete, or edit keywords.</td><td>Verify</td></tr>
<tr><td>Telemedicine Provider</td><td>You can submit a case to a telemedicine provider directly through the telemedicine provider’s website. The Telemedicine Provider default settings allow you to enter the provider’s website address and associated information used to reach the telemedicine provider.

You can add, delete, or edit providers.

After adding a provider, click Apply, click the row in the table, and click Test Tele-provider.

<table>
<tr><th colspan="2">Table Fields</th></tr>
<tr><td>Name</td><td>Type the name to display for this provider on the Case window.</td></tr>
<tr><td>Homepage</td><td>For future functionality.</td></tr>
<tr><td>API URL</td><td>Type the web address for the telemedicine provider. Be sure to start with http:// or https:// per the instructions of the provider.</td></tr>
<tr><td>Login
Password</td><td>Type the login and password for the telemedicine provider's site.</td></tr>
<tr><td>Authentication</td><td>From the drop-down list, select the password authentication method specified by the telemedicine provider.</td></tr>
</table></td><td>Set up</td></tr>
</table>

DICOM® Imaging Default Settings

The DICOM® Imaging module includes more features than Cornerstone* Imaging and is designed to be used with image and video sources (digital x-ray systems, ultrasound systems, endoscopes, etc.). DICOM Imaging requires an activation key to use. (Diagnostic Imaging, available with previous versions of Cornerstone, includes a similar set of features.

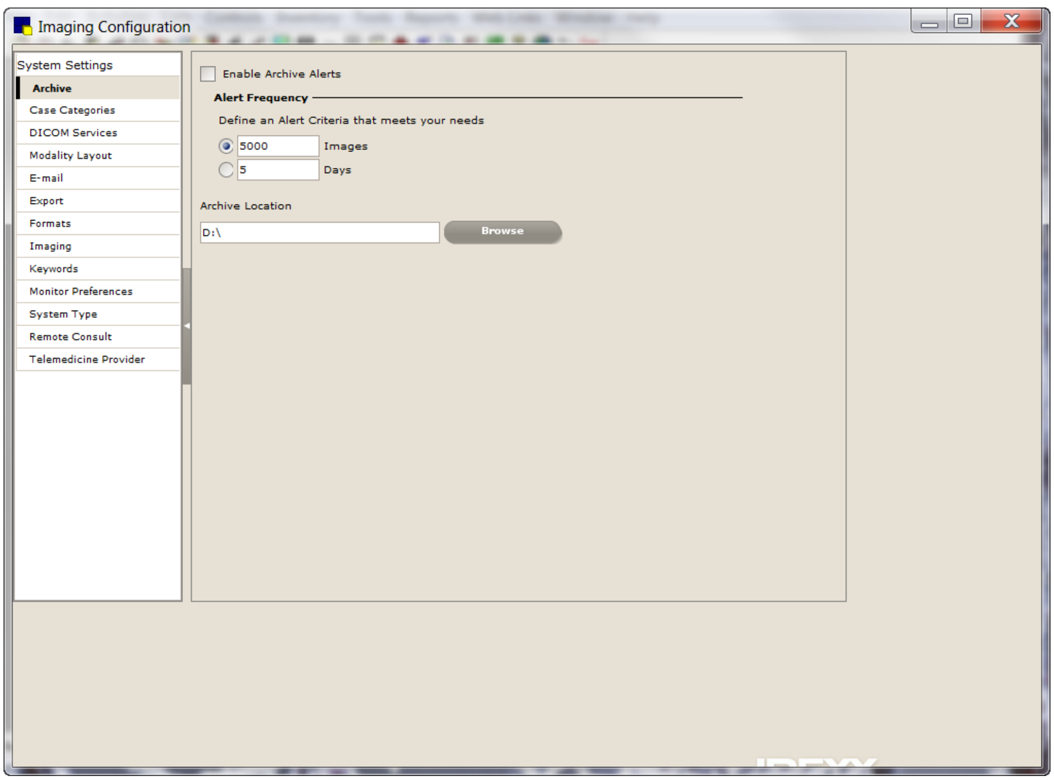
For detailed information, see the Cornerstone Help or the *IDEXX Cornerstone Diagnostic Imaging User's Guide*, available within Cornerstone or at idexx.com/cornerstoneresources.

This section covers only those items not covered in the previous section. Before you complete this section, complete the "Cornerstone Imaging Default Settings" section starting on page 86. If you are also using the IDEXX-PACS* module, you will also need to complete the "IDEXX PACS Default Settings" section starting on page 95.

For information on Practice and Workstation defaults for imaging (pet picture compression, image storage, and IDEXX SmartLink* Digital Imaging preferences for image requests), see page 41 in this guide.

To access the Imaging Configuration window, from the menu bar, go to **Controls > Defaults > Imaging**. Then, click the item to set up in the navigation pane on the left. The items in the navigation pane vary, depending on what you have installed.

As you work through the settings, click **Apply** to save your changes without closing the Imaging Configuration window, or click **Save** to save your changes and close the window.



<table>
<tr><th>Menu Access</th><th>Default/Description</th><th>Action & Decision</th></tr>
<tr><td>Activities> Imaging> DICOM Printer> DICOM Printer> Select DICOM Printer > New</td><td>New DICOM Printer window

To select and configure a printer for DICOM printing, you will need to consult the conformance statement and other documentation for your DICOM printer. If you have questions, contact the manufacturer of your DICOM printer or contact IDEXX Customer Support at 1-877-433-9948.

If you have already configured a DICOM printer, select the printer from the Printer drop-down list.

Notes:

When you set up your DICOM printer with Cornerstone for the first time, you need to call IDEXX Customer Support at 1-877-433-9948 to activate the feature.

Some printers require additional setup. See the IDEXX Cornerstone Diagnostic Imaging User’s Guide for more information.

<table>
<tr><td>Name</td><td>Type the name of the DICOM printer.</td></tr>
<tr><td>Host</td><td>Type the host for the printer.</td></tr>
<tr><td>Port</td><td>Type the port for the printer.</td></tr>
<tr><td>Called AE Title</td><td>Type the called application entity title. This information can be found in the DICOM printer’s conformance statement.
Note: This is the local server AE title shown on the Imaging Configuration window when Local Server is selected on the left.</td></tr>
<tr><td>Calling AE Title</td><td>Type the application entity for your DICOM server.</td></tr>
<tr><td>Max PDU Length</td><td>Type the maximum protocol data unit length. This value can be found in the DICOM printer’s conformance statement.</td></tr>
<tr><td>Timeout boxes</td><td>Unless otherwise specified in the DICOM printer’s conformance statement, accept the defaults for the Timeout text boxes.</td></tr>
<tr><td>Supports Presentation LUT</td><td>Select this check box if the DICOM printer supports lookup tables.</td></tr>
</table></td><td>Verify</td></tr>
<tr><td>Controls> Defaults> Staff > Miscellaneous tab</td><td>Staff Defaults window

<table>
<tr><th colspan="2">Imaging</th></tr>
<tr><td>Enable keyboard shortcuts</td><td>Select this check box to allow keyboard shortcuts on the Image Viewer for this user.</td></tr>
<tr><td>Show advanced search on Image Explorer</td><td>Select this check box to display advanced search on the Image Explorer window for the selected staff member.</td></tr>
</table></td><td>Verify</td></tr>
</table>

Controls > Defaults > Imaging

Menu Access	Default/Description	Action & Decision
Case Categories	Category names (cytology, musculoskeletal, dermatology, etc.) appear in a list on the Case Details window, allowing you to choose a category to assign to the image case. Image cases are created to send images to specialists for consulting. Assign categories to your image cases so you can search for all of the image cases with the same category designation or to find all cases that match a selected category. You can add, delete, or edit categories.	**Verify**
DICOM Services > Local Server	Define the local server configuration for DICOM Services. **Note**: If you are setting up DICOM services on more than one server, give the servers different names to avoid confusion.	**Verify**

Common Server Settings	
AE Title	Type the application entity (AE) title. This is the name of your local server.
Port Number	Type the port number.
Transfer Queue Watch Interval	Type the interval (in seconds) that the DICOM server should wait before checking the DICOM Queue for images to send.
C-FIND Options	
Do not make changes in this area. These advanced features should be changed only with consultation from IDEXX Customer Support.	
DICOM/Network Settings	
Maximum Number of Clients	Type the maximum number of external devices that can access the local DICOM server for requests at one time.
DIMSE Timeout	Type the time (in seconds) that can elapse before the DICOM message service element (DIMSE) times out once the DICOM server has opened a line of communication with an external device.
Socket Close Delay	Type the time (in milliseconds) that can elapse before the socket between the local device and an external device closes after a line of communication has ended.
Maximum PDU Length	Type the maximum protocol data unit (PDU) found in the local DICOM server's conformance statement.
Request Timeout	Type the time (in seconds) that can elapse before the local server times out when a request is received but no image is received.
Incoming DICOM Server Registration Required	Select this check box if you want Cornerstone to accept files only from servers that are on the remote servers list.
Image Import Settings	
Watch Directory	Type the directory from which DICOM services should automatically import images.
Watch Interval	Type the time (in seconds) for how frequently DICOM Services should check the watch directory. Set the value to 0 if you do not want DICOM Services to check the watch directory.
Patient Match Level	From the drop-down list, select the method for matching patients. Options are **Patient ID** or **Patient Name, Sex, Species, DOB, Client Last Name**.

<table>
<tr><th colspan="2">Controls > Defaults > Imaging</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default/Description</th></tr>
<tr><td>DICOM Services > Remote Servers</td><td>Remote (external) server settings. You can add, edit, and delete servers. To test a server, select it and click Test Server.
<table>
<tr><th colspan="2">Remote Servers</th></tr>
<tr><td>Server Name</td><td>Type the server name. This name appears in the Configure Servers drop-down list.</td></tr>
<tr><td>Server Address</td><td>Type the external server's IP address.</td></tr>
<tr><td>Port #</td><td>Type the port number for the external server.</td></tr>
<tr><td>AE Title</td><td>Type the name of the called application entity (AE). This is the application entity title for the external server.</td></tr>
<tr><td>Support Query Retrieve</td><td>Select this check box to use the DICOM Query/Retrieve feature to search for images and then import them from this remote server.</td></tr>
<tr><td>Support MPPS</td><td rowspan="2">Do not make changes in this area. These advanced features should be changed only under the guidance of an IDEXX representative.</td></tr>
<tr><td>PACS Server</td></tr>
</table></td><td>Verify</td></tr>
<tr><td>DICOM Services > Manufacturers</td><td>Each DICOM device, local or external, has its own DICOM conformance statement. One component of this statement defines the device's fields, which consist of a group number and an element number. Most manufacturers use a universally defined DICOM-standard group number and element number for each common tield (e.g., patient name, patient ID, study date, referring doctor name). Occasionally, however, a manufacturer may assign a different group number and element number to one of these common fields. Each text box, whether common or device-specific, has a group number and element number and is defined in the device's conformance statement.

You can add, edit, and delete manufacturers.</td><td>Verify</td></tr>
<tr><td>DICOM Services > Manufacturer Mapping</td><td>The IDEXX DICOM Services program contains a list of predefined manufacturers and their specific modalities (e.g., computed radiography, computed tomography, magnetic resonance). You can select a specific manufacturer/modality from the lists and then map your local DICOM server's fields accordingly.

New manufacturers/modalities are added when the new device pings the local DICOM server and a connection is made. The new device sends a DICOM file to the local server; this file contains the names of the manufacturer and the modality. Cornerstone stores that information and makes it available in the Manufacturer Mapping window. You can then map your local DICOM server's fields as needed to ensure successful communication between the two devices.

You can add, edit, and delete mapped fields.
<table>
<tr><td>Manufacturers</td><td>From the drop-down list, select the manufacturer.</td></tr>
<tr><td>Modalities</td><td>From the drop-down list, select the modality (for example; computer radiography, magnetic resonance, ultrasound) for which you are mapping fields.</td></tr>
<tr><th colspan="2">Use the conformance statements for the local DICOM server and the selected device to add the following:</th></tr>
<tr><td>Group</td><td>Type the group number assigned to a selected text box for the local DICOM server.</td></tr>
<tr><td>Element</td><td>Type the element number assigned to a selected text box for the local DICOM server.</td></tr>
<tr><td>Mfr Group</td><td>Type the group number assigned to a selected text box by the devices' manufacturer.</td></tr>
<tr><td>Mfr Element</td><td>Type the element number assigned to a selected text box by the device's manufacturer.</td></tr>
<tr><td>Default</td><td>Type the default value assigned to a selected text box by the device's manufacturer.</td></tr>
<tr><td>Override</td><td>Type the value that the local DICOM server will use to replace the device manufacturer's default value.</td></tr>
</table></td><td>Verify</td></tr>
</table>

<table>
<tr><th colspan="2">Controls > Defaults > Imaging</th><th rowspan="2">Action & Decision</th></tr>
<tr><th>Menu Access</th><th>Default/Description</th></tr>
<tr><td>Modality Layout</td><td>
You can set up how you want images to be displayed on the Image Viewer window based on the modality of the images.
Note: When you change these settings, you are changing how all images of that modality are displayed. For example, if you change the settings for arranging DR images in the viewer, the new settings will apply any time you look at DR images.
<table>
<tr><th colspan="2">Dental Configuration</th></tr>
<tr><td>Modality</td><td>From the drop-down list, select a modality.</td></tr>
<tr><td>Template</td><td>If you are using IDEXX-PACS and you selected Intra-oral Radiography as the Modality, select a template from the drop-down list. The template is displayed in the Preview area. The remaining areas in this section are not applicable.</td></tr>
<tr><th colspan="2">Study Layout</th></tr>
<tr><td>Rows</td><td rowspan="2">To set up how individual series are displayed within a study, type the number of rows and columns in the boxes. The series are displayed in a grid layout.</td></tr>
<tr><td>Columns</td></tr>
<tr><th colspan="2">Series Layout</th></tr>
<tr><td>Rows</td><td rowspan="2">To set up how individual images are displayed within a series using a grid layout, make sure the Stacked check box is cleared, and type the number of rows and columns in the boxes.</td></tr>
<tr><td>Columns</td></tr>
<tr><th colspan="2">Stacked</th></tr>
<tr><td colspan="2">To display the images within a series using a stacked display, select this check box. In a stacked display, one image is visible at a time and you can use the scroll bar to display the other images in the series.</td></tr>
</table>
</td><td>Verify</td></tr>
<tr><td>Export</td><td>From the drop-down list, select the default image file type for exporting a case to a CD or DVD. When you use the case export feature, you can choose a different file type. You do not have the option to change the file type at the time an image is exported.</td><td>Verify</td></tr>
<tr><td>Formats</td><td>
You can set up the ways that dates, phone numbers, and measurements are displayed on imaging-related windows in Cornerstone.
From each drop-down list, select the default format to use.
</td><td>Verify</td></tr>
<tr><td>Imaging</td><td>
<table>
<tr><th colspan="2">Image Capture Settings</th></tr>
<tr><td>Distance Units</td><td>From the drop-down list, select the default unit for measuring the distance between the x-ray plate and the x-ray source. Distance can be measured in feet, inches, meters, centimeters, or millimeters.</td></tr>
<tr><td>Exposure Units</td><td>From the drop-down list, select the default unit for measuring the x-ray exposure time. Exposure time can be measured using AmpSeconds (As), milliAmpSeconds (mAs), or microAmpSeconds (uAs).</td></tr>
<tr><th colspan="2">DICOM Compression Settings</th></tr>
<tr><td>DICOM</td><td>From the DICOM drop-down list, select one of the following compression types to use when sending files via DICOM:

RAW—To send DICOM images that have not been compressed.
JPEGlossless—To send DICOM images that are compressed but have little to no loss of image quality.
</td></tr>
</table>
</td><td>Verify</td></tr>
</table>

Controls > Defaults > Imaging		Action & Decision
Menu Access	**Default/Description**	
Monitor Preferences	You can display a patient's images on more than one monitor. If you have two monitors, the Image Explorer window is displayed on one monitor and the Image Viewer window showing the patient's image series is displayed on the other. If you have more than two monitors, you can display a separate Image Viewer on each additional monitor. In the Monitor Settings table, all the monitors that are set up for your system are listed in the **Monitor** column. Select the check box in the **Use Monitor** column for each monitor that you want to use.	**Verify**
System Type	The System Type options are used to select the IDEXX Digital Imaging system you are using when the system is first installed. DO NOT change any of the system type options without consulting IDEXX Digital Imaging Support. For service within the United States or Canada, call 1-877-433-9948.	**Verify**
Remote Consult	The Remote Consult button connects you to up to five web addresses for consulting radiology services. You can add, edit, and delete web addresses. **URLs** Description: Type the name of the website. URL: Type or paste (CTRL + V) the URL for the website.	**Verify**

IDEXX-PACS* Software Default Settings

If you have an IDEXX Digital Imaging system, you have IDEXX-PACS* software with all the Cornerstone* Imaging and DICOM® Imaging features. In addition, you have the ability to capture radiographs, along with features to make the image capture process more efficient.

For detailed information, see the Cornerstone Help or the *IDEXX Cornerstone Diagnostic Imaging User's Guide*, available within Cornerstone or at idexx.com/cornerstoneresources.

This section covers only those items not covered in the previous two sections. Before you complete this section, complete the "Cornerstone Imaging Default Settings" section starting on page 86 and the "DICOM Imaging Default Settings" section starting on page 89.

For information on Practice and Workstation defaults for imaging (pet picture compression, image storage, and IDEXX SmartLink* Digital Imaging preferences for image requests), see page 41 in this guide.

To access the Imaging Configuration window, from the menu bar, go to **Controls > Defaults > Imaging**. Then, click the item to set up in the navigation pane on the left. The items in the navigation pane vary, depending on what you have installed.

As you work through the settings, click **Apply** to save your changes without closing the Imaging Configuration window, or click **Save** to save your changes and close the window.

<table>
<tr><th colspan="3">Controls > Defaults > Imaging</th></tr>
<tr><th>Menu Access</th><th>Default/Description</th><th>Action & Decision</th></tr>
<tr><td>Dashboard</td><td>The Dashboard window contains lists of the most recent clients, patients, and studies you have viewed. You can specify how many days of each you want displayed.<table><tr><td>Days of Clients to Display</td><td rowspan="3">Type the number of days to display for each item.</td></tr><tr><td>Days of Patients to Display</td></tr><tr><td>Days of Studies to Display</td></tr></table></td><td>Verify</td></tr>
<tr><td>DICOM Services

Auto-Routing</td><td>The auto-routing feature allows you to automatically send images via DICOM to a destination of your choice.<table><tr><td>Auto-Routing Mode</td><td>Select the type of auto-routing (Manual, Semi-Automatic, or Automatic) that you want to use.</td></tr><tr><td>Remote Servers</td><td>Select each destination for where images should be sent.</td></tr></table></td><td>Verify</td></tr>
<tr><td>Exam Trees</td><td>If you want to add customized exam type collections or new individual exam types to the Choose Exam Type menu that is used during the image capture process, contact IDEXX customer support. For service within the United States or Canada, call 1-877-433-9948.

We strongly recommend that you do not adjust any of the settings on Exam Trees section of the Imaging Configuration window without consulting IDEXX customer support and backing up your existing exam tree.</td><td>Verify</td></tr>
</table>

<table>
<tr><th colspan="3">Controls > Defaults > Imaging</th></tr>
<tr><th>Menu Access</th><th>Default/Description</th><th>Action & Decision</th></tr>
<tr><td>Global Settings</td><td>
You can change imaging settings for a variety of features that are applied to Cornerstone for all users. If you are using the software on a network, these settings are applied to all computers on the network.
<table>
<tr><td>Show Plate Handle Locator</td><td>Select this check box to display a marker to show the orientation of the detector plate for images that you capture. The marker appears as two small squares next to each other—one black and one white. The plate handle locator marker appears on the image in the corner where the cable attaches to the plate—if you are looking at the plate from the front with the handle on the left side, this would be the upper left corner.</td></tr>
<tr><td>Enable Client Patient Security</td><td>Select this check box to display only images you created (or, if you are a veterinarian, images that were created for you) on the Image Explorer and the Imaging Dashboard windows.</td></tr>
<tr><td>Set Single Species Mode</td><td>Select this check box to display only one species and the related breeds as choices when you search for patients from the Image Explorer or Imaging Dashboard windows.</td></tr>
<tr><td>Search Matching Options</td><td> To help ensure confidentiality, you can specify when imaging-related search functions return results. You can choose to have the search function return results only when you have typed a full name or only after you have typed a certain number of characters. This feature applies to searches on the Image Explorer window, and the Select Client and Patient window.
Select one of the following:
None—Return results now matter how many characters are typed in the search box.
__ Characters— Type a number in the box to return results only when you type at least that number of characters in the search box.
Exact Match—Return results only when you type the full name. </td></tr>
</table>
</td><td>Verify</td></tr>
<tr><td>Presets > New</td><td>
Presets Configuration Detail window
You can set up presets to apply new window and level settings to an image in the Image Viewer. These presets are available when you click the Window/Level Presets tool in the Image Viewer. There are two kinds of presets—system presets and user presets. All users can use the System Presets, but only the person who is the Administrator for your Cornerstone software can edit system presets or create new ones. Each user can create and edit user presets that are available only to that user. Click the System tab to change system presets or tab with your user name to change user presets.
You can also copy presets to another user, edit presets, and restore factory-setting presets to original values. See the IDEXX Cornerstone Diagnostic Imaging User's Guide or the Help in Cornerstone for more information.
<table>
<tr><td>Name</td><td>Type a name for the preset.</td></tr>
<tr><td>Modality</td><td>Select the type of device used to capture images to which this preset will be applied.</td></tr>
<tr><td>Type</td><td rowspan="3"> To change window and level values by specifying exact values, select Absolute in the Type box. Enter the window (contrast) value in the Window box and the level (brightness) value in the Level box.
To change window and level values relative to their current settings, select Relative in the Type box.
To increase or decrease values in the Window % (contrast) box, enter percentage values that are greater or less than 100. For instance, type 110 to increase the window value by 10% and type 90 to lower it by 10%.
To increase or decrease values in the Level Shift (brightness) text box, type the number that you want to be added to or subtracted from the current level value. For instance, typing 500 will add 500 to the current level value, while typing -500 will subtract 500.</td></tr>
<tr><td>Window</td></tr>
<tr><td>Level</td></tr>
<tr><td>Hide</td><td>On the Presets window, select this check box if you do not want the preset to be displayed in the Image Viewer. You cannot hide system presets.</td></tr>
</table>
</td><td>Verify</td></tr>
</table>

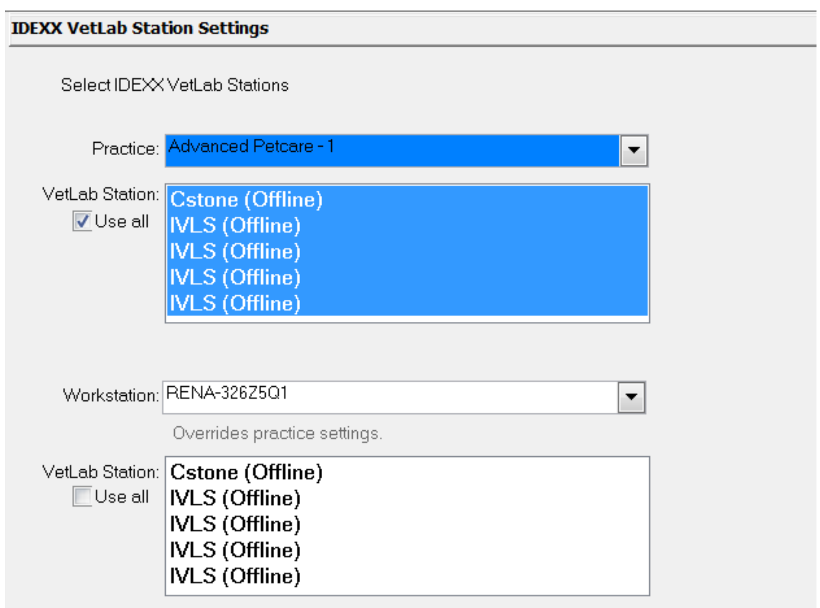
Laboratory Default Settings

The following settings are for the Laboratory module. Settings may vary depending on the laboratory.

Controls > Defaults > Practice and Workstation			**Action & Decision**
Menu Access	**Default**	**Description**	
IDEXX VetLab Settings *See figure VL*	Practice VetLab Station Use all	You can specify default computers to be used for specific workstations and practice locations. When ordering tests, staff can always override these defaults and choose from the entire list of IDEXX VetLab* Station computers. *Multi-Location Single Database only*: To specify a default IDEXX VetLab* Station for a practice location, select the practice name from the **Practice** list, and then select the IDEXX VetLab Station in the **VetLab Station** box. Select the **Use all** check box to use all VetLab Station computers. Repeat for other practice locations and workstations as needed. **Note**: If practice and workstation settings conflict, the workstation settings take precedence.	**Set up**
	Workstation VetLab Station Use all	You can specify default computers to be used for specific workstations and practice locations. When ordering tests, staff can always override these defaults and choose from the entire list of IDEXX VetLab Station computers. To specify a default IDEXX VetLab Station for a workstation, select the workstation name (workstation names are displayed on each IDEXX VetLab Station) from the **Workstation** drop-down list, and then select the IDEXX VetLab Station in the **VetLab Station** box. Repeat for other workstations as needed. **Note**: If practice and workstation settings conflict, the workstation settings take precedence.	

Figure VL

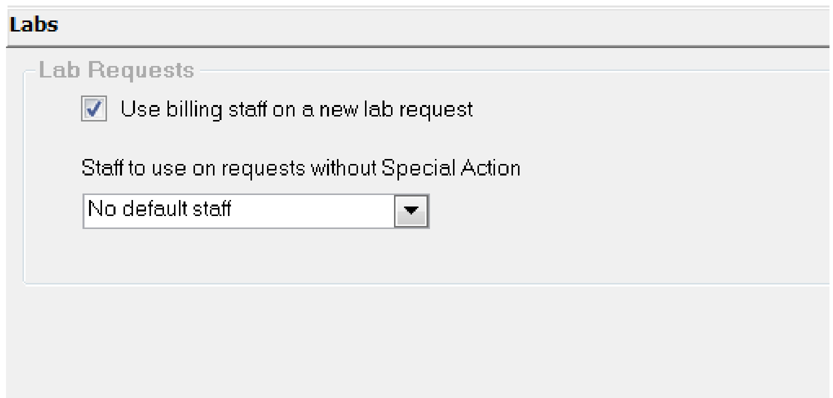
(Controls > Defaults > Practice and Workstation > IDEXX VetLab Settings)



Controls > Defaults > Practice and Workstation			Action & Decision
Menu Access	**Default**	**Description**	
Labs *See figure LB*	Use billing staff on a new lab request	Select this check box to designate that the billing staff on the Patient Visit List or the invoice should be used as the default staff ID on the request. If this check box is not selected, the default staff ID for special action requests is the last staff member who performed a lab request on the workstation.	**Set up**
	Staff to use on requests without Special Action	Select the staff to use for lab requests not associated with special actions. Options are **No default staff**, **Last staff used on workstation**, or **Specific staff** (enter staff ID).	

Figure LB

(Controls > Defaults > Practice and Workstation > Labs)



<table>
<tr><th>Menu Access</th><th>Default/Description</th><th>Action & Decision</th></tr>
<tr><td>Activities >
Lab Work >
Laboratories >
New
See figure LI</td>
<td>Lab Information window
If you use multiple laboratories, you must set up each one.
<table>
<tr><th colspan="2">Lab information</th></tr>
<tr><td>Name</td><td>Type the name of the lab.</td></tr>
<tr><td>Lab ID</td><td>Type the lab ID. This is the code your practice will use to identify the lab in Cornerstone.</td></tr>
<tr><td>Address</td><td rowspan="4">Enter the address for the lab.</td></tr>
<tr><td>City</td></tr>
<tr><td>State/prov</td></tr>
<tr><td>Postal code</td></tr>
<tr><td colspan="2">Requisition numbers</td></tr>
<tr><td>Manually enter requisition IDs</td><td>Select this option to manually enter requisition numbers.
You must select this option if the lab you are setting up is a reference lab and you need to enter requisition IDs from preprinted lab forms.</td></tr>
<tr><td>Use requisition ID ranges</td><td>Select this option to have Cornerstone automatically assign requisition numbers from ranges you specify.

Recommended setting for IDEXX In-clinic laboratory to ensure consistent requisition IDs.</td></tr>
<tr><td>Use patient ID for requisition ID</td><td>Select this option if your practice uses LabREXX* forms.</td></tr>
<tr><td>Requisition ID ranges</td><td>If you selected Use requisition ID ranges, the boxes in this area are enabled.
<table>
<tr><th colspan="2">Current range</th></tr>
<tr><td>Next ID</td><td>Type the next requisition ID to assign.
Cornerstone will automatically assign requisition numbers to lab requests in sequential order, starting with this number.</td></tr>
<tr><td>End ID</td><td>Type the last ID to assign in this range of requisition IDs.</td></tr>
<tr><td>Warning trigger</td><td>Type a number near the end of the range of numbers. When this requisition number is assigned to a request, Cornerstone will display a warning on the screen to let you know that you are almost at the end of the current requisition number range.</td></tr>
<tr><th colspan="2">Next range</th></tr>
<tr><td>Begin ID</td><td>Type the first requisition ID that you want to assign after you run out of numbers in the current range.</td></tr>
<tr><td>End ID</td><td>Type the last ID you want to assign in the next range of requisition IDs.
Note: If you do not specify a range of numbers in the Next Range fields and you run out of numbers in the Current Range fields, you will not be able to request any more lab profiles until you assign a new range of numbers.</td></tr>
</table>
</td></tr>
<tr><td></td><td></td></tr>
</table>
</td>
<td>Verify</td></tr>
</table>

Menu Access	Default/Description		Action & Decision
Activities > Lab Work > Laboratories > New *(continued)* *See figure LI*			**Verify**
	Units	Select **Common units** or **SI units (international)**. If you are in the United States, select Common units.	
	Display color	To display the lab name in a different color when you view cumulative results, select a color for this lab from the drop-down list.	
	Cumulative display	To display cumulative results in a particular order, select the order from the drop-down list. Options are **Ascending** (least recent to most recent) or **Descending** (most recent to least recent).	
	Preferences		
	Use as default tab	If this laboratory is the one most frequently used by your clinic, select this check box. When making a new lab request, this lab will display on the request. Generally, your default lab will be your in-clinic laboratory.	
	Review results before posting	Select this check box if you want to post results manually. Clear this check box if you want results to post to the Patient Clipboard automatically. **Note:** Orphan results and not requested results are not automatically posted to a patient's record, regardless of your selection here. They may be viewed from the Lab Requests and Results window.	
	Require sample drawn by info	Select this check box to make the **Sample drawn by** field on a lab request a required field for your clinic.	
	Use order numbers	An order number is a number assigned by a clinical lab to a profile. Order numbers must be used for reference laboratories and are not used with in-clinic work. Select this check box to use order numbers with this laboratory.	
	Close partial pending profiles	Sometimes not all the tests in a particular profile come back. Select this check box if you want to close partial pending profiles and consider them finished. This option applies only to your in-clinic laboratory.	
	Require requests	Select this check box if you want laboratory results to be automatically matched to pending requests. If you choose to not require requests, your practice must remember to manually bill the client.	
	Use favorites list	Your favorites list is a quick way to access the profiles you use frequently. Select this check box if you want to use the favorites list for this lab.	
	Use special actions	Select this check box if you want to create special actions that generate lab requests. Invoice items set up as special action lab requests automatically generate lab requests when they are entered on an invoice or Patient Visit List.	
	Hide request screen if no special action	If you are using the lab request special action, a lab request will be automatically created when the item is entered on an invoice or the Patient Visit List. Select this check box if you are using the lab request special action and you don't want to view the lab request when it is created.	
	Warn in invoicing if Not Req results exist	Select this check box if you want a warning message to appear at invoicing if a patient has not-requested results. This helps prevent missed lab charges.	
	Use VetLab Station SmartLink billing	Select this check box to allow a client to be billed for lab results returned to Cornerstone from the IDEXX VetLab Station with the use of the Census List feature. If selected, the **Require requests** option must also be selected to avoid missed charges.	

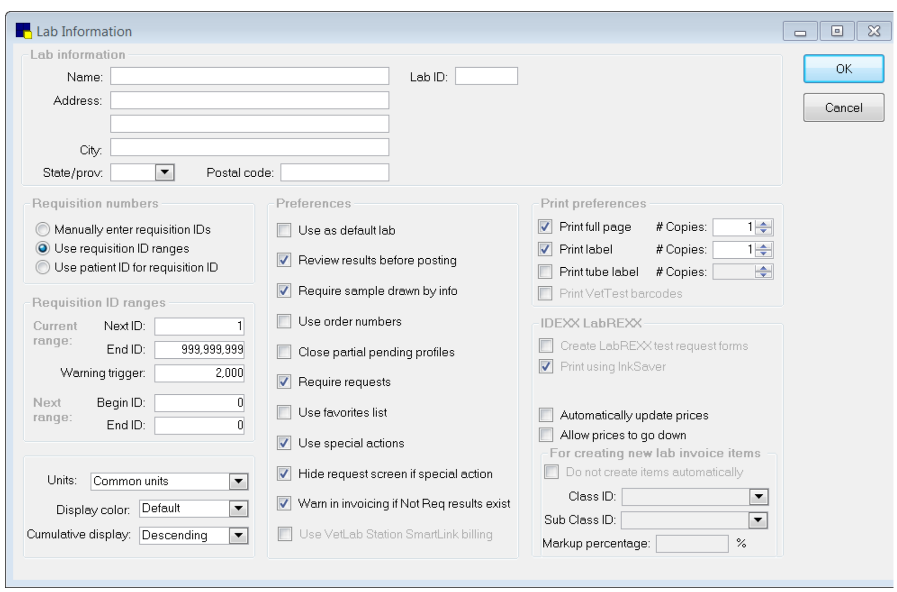
Menu Access	Default/Description		Action & Decision
Activities > Lab Work > Laboratories > New *(continued)* *See figure LI*	**Print preferences**		**Verify**
	Print full page	Select this check box to print full page lab requests. When making a request, you can override this default. Enter the default number of copies in the corresponding **# Copies** box.	
	Print label	Select this check box to always print a lab request label. When making a request, you can override this default. Enter the default number of copies in the corresponding **# Copies** box.	
	Print tube label	Select this check box to always print a label for tubes. The label size is 1.187” x 2.218.” Enter the default number of copies in the corresponding **# Copies** box.	
	Print VetTest barcodes	Select this check box to print barcodes for the patient ID, patient name, client last name, and the requisition ID. The barcodes may then be scanned into the VetTest analyzer when processing the sample.	
	IDEXX LabREXX **Note:** This area appears for IDEXX Reference Laboratories, IDEXX In-clinic Laboratory, or non-IDEXX in-clinic or reference laboratories. See the next page for details of how this area appears when you set up the Antech Diagnostics® laboratory module.		
	Create LabREXX test request forms	Select this check box to allow the use of use barcoded LabREXX requisition forms. When this check box is selected, the **Print full page** print preferences option is also automatically selected. The full page option prints the LabREXX barcoded requisition form (the regular Cornerstone lab request form will not be available for this lab). This field is only available for IDEXX Reference Laboratories.	
	Print using InkSaver	Select this check box if you want to print only the requested tests instead of all tests. This field is only available for IDEXX Reference Laboratories.	
	Automatically update prices	This field is available for all in-clinic and reference laboratories. Select this check box if you want to update Cornerstone reference laboratory prices automatically whenever the LabREXX test list is updated.	
	Allow prices to go down	This field is available for all in-clinic and reference laboratories. Select this check box if you want to allow LabREXX invoice item pricing to be lowered if IDEXX lowered the price for a LabREXX invoice item in its latest Directory of Services.	

Menu Access	Default/Description	Action & Decision
Activities > Lab Work > Laboratories > New *(continued)* *See figure LI*	See table below	**Verify**

For creating new lab invoice items **Note:** These fields are only active for IDEXX Reference Laboratories.	
Do not create items automatically	Select this check box if you do not want to create new lab invoice items automatically when a selected lab test contains items that are not already in your system. If you clear this check box, the default settings below will be used to create to create a new lab invoice automatically when you select a lab test with items that aren't already in your system.
Class ID Sub Class ID	If you want to create new lab invoices items automatically, select the classification (**Class ID**) and sub classification (**Sub Class ID**) in which you want these new items to be included.
Markup percentage	Type the markup percentage that you want to use. This markup will be applied to the IDEXX price for this test.
Antech online **Note**: This area appears in place of IDEXX LabRexx when a laboratory is set up as the Antech Diagnostics laboratory module.	
Markup percentage	Type the markup percentage that you want to use. This markup will be applied to the Antech price for this test.
Automatically update prices	Select this check box to automatically recalculate your practice prices based on the markup percentage you specify whenever new prices are downloaded from Antech Diagnostics. These prices are updated in Cornerstone during the next End of Day processing.
Allow prices to go down	Select this check box if you want to allow Antech invoice item pricing to be lowered if Antech lowered the price for an Antech invoice item.

Figure LI

(Activities > Lab Work > Laboratories > New)

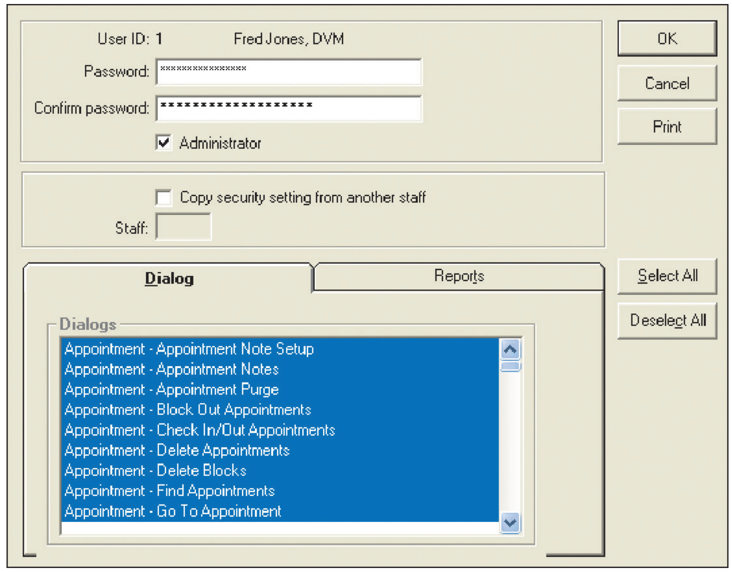


Menu Access	Default/Description	Action & Decision
Activities > Lab Work > Templates	Enter the tests to appear on your template. Use the up and down arrow keys to arrange the order in which your tests will appear. Click **New** to add a template or **Update** to update a template.	**Set up**
Activities > Lab Work > Default Test Ranges	For each kind of result you plan to enter manually, select species, age range, lab, and template. Then fill in the Defaults table with units, and low and high values (columns) for each test (row). **Note**: Before completing this setup step, you need to have already set up lab age ranges as well as the laboratory and templates for which you want to manually enter results.	**Set up**

Security Settings

Security options addressed in this document are unique to each practice and each practice has different priorities. The following list provides a general guideline for assigning security settings.

- Method A – Setting security based on individualized logins (recommended)
- Method B – Setting security based on job title
- Method C – Two-tiered administrator/general login



Suggested Security Settings:

Method A – Setting security based on individualized logins: If everyone in your clinic needs to have their own login, then this method of setting security is the one you should follow. You will need to set up each staff member under his or her name and then set security for each employee based on their job title using the security setting guide below. Using this method will allow you to track changes to invoices and patient visit lists. This is the recommended method.

Method B – Setting security based on job title: This method consists of setting security based on job titles, such as receptionist, doctor associates, technicians, office managers, and administrator. The administrator will have access to everything in Cornerstone. You will need to set up a staff login for each job title, and your employees will sign in under that job title using the appropriate password. You will use the security setting guide below to do this. This method does not allow you to effectively track changes to invoices or Patient Visit Lists.

Method C – Two-tiered administrator/general login: This method consists of only two types of security. The first is an administrator login (for one or two people who have access to everything in Cornerstone). The second is a general login that everyone will use. This method does not allow you to effectively track changes to invoices or patient visit lists.

When you set up security for this type of method, you will not select security settings with these key words for the Dialog tab–

• Set-up	• Purge	• Change Passwords	• Reports	• GL Interface
• Merge Clients/Patients	• Cornerstone Performance Tracker	• Staff Class Commissions	• Cornerstone Snapshot	• Invoice Void
• Mass Markup	• Unattended Set	• Staff Commissions	• Update Revenue Centers	• Information (excluding client and patient information)

For the Reports tab – You will need to go through the list and determine if the general login will need access to those listed reports.

Note: If you are upgrading from Cornerstone 8.2 to 8.3, see *Cornerstone 8.3 Getting Started Guide,* section 8, "Security and Setup," for a list of only those dialog and report security settings that have been introduced between 8.2 and 8.3.

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Cornerstone Security Settings Guide

Some of these options will not display in your security list if you have not purchased one of these Cornerstone modules: Boarding and Grooming, DICOM® Imaging (or Diagnostic Imaging), IDEXX-PACS*, In-clinic Laboratory Module, Patient Advisor*, Mobile Computing, or Pharmacy Formulary.

Key: **GEN**: General Login under Method C; **REC**: Receptionists; **TECH**: Technicians; **DR**: Doctors; **M/O**: Managers/Owners

Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Address Alignment – Estimates					X	Controls > Defaults > Practice and Workstation > Estimate > Estimate Address
Antech – Lab Item Price Update			X	X	X	Activities > Lab Work > Update Antech Lab Item Prices
Appointment – Appointment Note Setup					X	Appointment Scheduler icon > Notes button > New
Appointment – Appointment Notes	X	X	X	X	X	Appointment Scheduler icon > Notes button
Appointment – Appointment Purge					X	Activities > Appointment Scheduler > Appointment Purge
Appointment – Block Out Appointments	X	X	X		X	Appointment Scheduler icon > Block button
Appointment – Check In/Out Appointments	X	X	X	X	X	Appointment Scheduler icon > Check-in button
Appointment – Copy/Paste Appointments	X	X	X	X	X	Appointment Scheduler icon > Right-click appointment > Select Copy
Appointment – Delete Appointments	X	X	X	X	X	Appointment Scheduler icon > Delete button
Appointment – Delete Blocks	X		X		X	Appointment Scheduler icon > Delete button
Appointment – Find Appointments	X	X	X	X	X	Appointment Scheduler icon > Find button
Appointment – Go To Appointment	X	X	X	X	X	Appointment Scheduler icon > Go To button
Appointment – Locate Appointments	X	X	X	X	X	Appointment Scheduler icon > Locate button
Appointment – Move Appointments	X	X	X	X	X	Appointment Scheduler icon > Move button
Appointment – Practice Setup –Templates					X	Controls > Appointment Scheduler > Practice Setup > Template Designs
Appointment – Reason for Visit	X	X	X	X	X	Controls > Appointment Scheduler > Reason for Visit
Appointment – Reason for Visit Setup					X	Controls > Appointment Scheduler > Reason for Visit > New
Appointment – Reports	X	X	X	X	X	Reports > Appointment Scheduler > Appointments Report

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Appointment – Schedule Appointments	X	X	X	X	X	Appointment Scheduler icon > Schedule button
Appointment – Schedule for Today	X	X	X	X	X	Appointment Scheduler icon > Today button
Appointment – Schedule for Week	X	X	X	X	X	Appointment Scheduler icon > Weekly button
Appointment – Schedule for Week Legend	X	X	X	X	X	Appointment Scheduler icon > Weekly button > Legend button
Appointment – Staff Goals Setup					X	Controls > Appointment Scheduler > Staff Setup > Goals button
Appointment – Staff Hours Setup					X	Controls > Appointment Scheduler > Staff Setup > Hours button
Appointment – Staff Setup					X	Controls > Appointment Scheduler > Staff Setup
Appointment – Template Design					X	Controls > Appointment Scheduler > Template Designs > New
Appointment – Template Design Description					X	Controls > Appointment Scheduler > Template Designs
Appointment – Tickler File	X	X	X	X	X	Appointment Scheduler icon > Tickler button
Appointment – Update Appointments	X	X	X	X	X	Appointment Scheduler icon > Update button
Appointment – View Appointments	X	X	X	X	X	Appointment Scheduler icon > View button
Appointments – Suite Information			X		X	Controls > Appointment Scheduler > Suite Setup > New or Update
Appointments – Suite Setup			X		X	Controls > Appointment Scheduler > Suite Setup
Assign Client to Practice					X	Tools > Assign Client to Practice
Backup Logs					X	Reports > Back-up Log
Backup Verification Assistant					X	Tools > Backup Verification Assistant
Billing Message Setup					X	Controls > Billing Messages > New
Billing Messages	X	X	X	X	X	Controls > Billing Messages
Boarding Block Cages[4]					X	Activities > Boarding > Block Cages
Boarding Cage Information[4]	X	X	X	X	X	Activities > Boarding > Cage Type > New
Boarding Cage Type List[4]	X	X	X	X	X	Activities > Boarding > Cage Type
Boarding Delete Reservation[4]	X	X	X	X	X	Reservation icon > Delete
Boarding Make Reservation[4]	X	X	X	X	X	Reservation icon > New
Boarding Print Boarding Documents[4]	X	X	X	X	X	Activities > Boarding > Print Boarding Documents
Boarding Reservation Book[4]	X	X	X	X	X	Activities > Boarding > Reservation Book
Boarding Reservation List[4]	X	X	X	X	X	Reservation icon

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Boarding Reservation Recurrence[4]	X	X	X	X	X	Reservation icon > Right-click on reservation
Boarding Reservation Type Information[4]					X	Activities > Boarding > Reservation Type > Update
Boarding Reservation Type List[4]	X	X	X	X	X	Activities > Boarding > Reservation Type
Boarding View Cage Availability[4]	X	X	X	X	X	Activities > Boarding > View Cage Availability
Breed List	X	X	X	X	X	Lists > Species > Update
Breed Setup					X	Lists > Species > Update > Add
Call Back Note Information				X	X	Lists > Call Back Notes > Update
Call Back Notes	X	X	X	X	X	Lists > Call Back Notes
CareCredit	X	X	X	X	X	CareCredit icon OR Activities > CareCredit
Cashier ID Information					X	Lists > Cashier ID > Update
Cashier ID List	X	X	X	X	X	Lists > Cashier ID
Census List	X	X	X	X	X	Lists > Census OR F3 key
Change IDs					X	Tools > Change IDs
Change Password					X	File > Change Password
Classifications	X	X	X	X	X	Lists > Invoice Item Class
Classifications Setup					X	Lists > Invoice Item Class > Update
Client Account	X	X	X	X	X	Client Account icon
Client Account Adjustment					X	Client Account icon > Adjust button
Client Account Comment					X	Client Account icon > Comment button
Client Account Payment	X	X	X	X	X	Client Account icon > Payment button
Client Account Returned Check					X	Client Account icon > Rtn Check button
Client Account Transfer					X	Client Account icon > Transfer button
Client Account Write Off/ Reinstate					X	Client Account icon > Write Off button OR Reinstate button
Client Information	X	X	X	X	X	Client List icon > Update
Client Information A/R Info	X	X	X	X	X	Client List icon > Update > A/R Info
Client List	X	X	X	X	X	Client List icon
Client List – Phone	X	X	X	X	X	Client List icon > Select client > Update button
Client Reports	X	X	X	X	X	Reports > Client
Color Setup					X	Controls > Colors > Update
Colors	X	X	X	X	X	Controls > Colors
Compliance – Compliance Test Setup					X	Reports > Compliance Assessment Tool* > Protocol Setup Wizard
Compliance – Generate Compliance Results					X	Reports > Compliance Assessment Tool > Generate Compliance Results

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Compliance – Protocol Group Setup					X	Reports > Compliance Assessment Tool > Protocol Group Set up
Compliance – Protocol Setup Wizard					X	Reports > Compliance Assessment Tool > Protocol Setup Wizard
Controlled Substance Export					X	Controls > Controlled Substance > Controlled Substance Export
Controlled Substance Export List					X	Controls > Controlled Substance > Controlled Substance Export
Controlled Substance Export Setup					X	Controls > Controlled Substance > Controlled Substance Export > New/Update
Controlled Substance Reason Information			X		X	Controls > Controlled Substance Reasons > Update
Controlled Substance Reason List	X	X	X	X	X	Controls > Controlled Substance Reasons
Convert between Markup/Margin					X	Tools > Convert Between Markup/Margin
Correspondence	X	X	X	X	X	Activities > Correspondence or Correspondence icon
Correspondence – Finalize	X	X	X	X	X	Activities > Correspondence or Correspondence icon
Create Phone List					X	Only available if the clinic has the auto dialer
Credit Code Setup					X	Controls > Credit Codes > New
Credit Codes	X	X	X	X	X	Controls > Credit Codes
Custom Client and Patient Reports	X	X	X	X	X	Reports > Client and Patient Report Builder
Daily Planner	X	X	X	X	X	Daily Planner icon
Data Services Agreement					X	Tools > Data Services Agreement
Database Purge					X	Tools > Purge Data
Defaults – Password					X	Controls > Practice and Workstation > Passwords
Defaults – Practice					X	Controls > Practice and Workstation
Defaults – Staff					X	Controls > Staff
Defaults – Workstation					X	Controls > Practice and Workstation
Departing Instruction Setup					X	Lists > Departing Instructions > New
Departing Instructions List	X	X	X	X	X	Lists > Departing Instructions
Diagnostic Code List	X	X	X	X	X	Lists > Diagnostic Codes
Diagnostic Code Setup			X		X	Lists > Diagnostic Codes > New
Discount Setup					X	Controls > Discounts > New
Discounts	X	X	X	X	X	Controls > Discounts
Document Template Category List	X	X	X	X	X	Lists > Documents > Template Categories

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Document Template Category Setup					X	Lists > Documents > Template > Categories > New OR Update
Document Template List	X	X	X	X	X	Lists > Documents > Template
Document Template Setup					X	Lists > Documents > Template > New OR Update
Documents – Void					X	From Patient Clipboard > Double-click on desired document > Select Void button OR Right-click on the desired “Title Only” > Select Void
End of Day Closing	X	X	X	X	X	Activities > End of Period > End of Day
End of Day Reports	X	X	X	X	X	Reports > End of Period > End of Day
End of Month Closing					X	Activities > End of Period > End of Month
End of Month Reports					X	Activities > End of Period > End of Month
End of Year Closing					X	Activities > End of Period > End of Year
End of Year Reports					X	Activities > End of Period > End of Year
Estimate	X	X	X	X	X	Activities > Estimate
Estimate Discounts	X	X	X	X	X	Controls > Discounts
Estimate Message Defaults					X	Controls > Defaults > Practice > Invoice & Estimate tab > Set Defaults Messages button
Estimate Messages	X		X	X	X	Controls > Estimate Messages
Estimate Options					X	Estimate icon > OK on new estimate > Options
Estimate Taxes	X	X	X	X	X	Controls > Taxes
Feeding Guide Profile	X	X	X	X	X	Activities > Feeding Guide > Feeding Guide Profile
Feeding Guide Setup					X	Activities > Feeding Guide > Feeding Guide Setup
Generate Reminders	X	X			X	Activities > Generate Reminders
GL Interface Manual Extract					X	Controls > General Ledger > Manual Extract
GL Interface Setup					X	Controls > General Ledger > Setup
Hill’s Storage & Handling	X	X		X	X	Activities > Feeding Guide > Storage & Handling Instructions
HL7 – Maintain Transactions					X	Tools
HL7 – Setup					X	Tools
Imaging Archive Settings					X	Controls > Defaults > Imaging > System Settings > Archive
Imaging Archiving			X		X	Activities > Imaging > Archiving
Imaging Auto-Crop Settings					X	Controls > Defaults > Imaging > Exam Trees > Auto Crop
Imaging Auto-Routing Settings					X	Controls > Defaults > Imaging > Exam Trees > Auto-Routing
Imaging Batch Print	X		X	X	X	Activities > Imaging > DICOM Printer > Batch Printing

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Imaging Capture Image	X		X	X	X	Activities > Imaging > Imaging Dashboard > Capture Image
Imaging Case Window	X		X	X	X	Activities > Imaging > Cases
Imaging Category List	X		X	X	X	Activities > Imaging > Category
Imaging Compare Images			X	X	X	Activities > Imaging > Image Explorer > Compare
Imaging Contrast Settings					X	Controls > Defaults > Imaging > Exam Tree Maintenance > Contrast
Imaging Create Patient CD	X	X	X	X	X	Activities > Imaging > Image Explorer > Create Patient CD
Imaging Dashboard	X	X	X	X	X	Activities > Imaging > Imaging Dashboard
Imaging Dashboard Settings					X	Controls > Defaults > Imaging > System Settings > Dashboard
Imaging Delete Images and Cases					X	Activities > Imaging > Cases > Delete
Imaging DICOM Modality Types			X	X	X	Activities > Imaging > DICOM Modality Types
Imaging DICOM Queue	X		X	X	X	Activities > Imaging > DICOM Queue or Activities > Imaging > Image Explorer > DICOM Queue
Imaging E–mail	X	X	X	X	X	Controls > Defaults > Imaging > System Settings > E–mail
Imaging Email Settings					X	Controls > Defaults > Imaging > System Settings > Email
Imaging Exams Settings					X	Controls > Defaults > Imaging > Exam Tree Maintenance > Exam
Imaging Export Settings					X	Controls > Defaults > Imaging > Export
Imaging Frequencies Settings					X	Controls > Defaults > Imaging > Exam Tree Maintenance > Frequencies
Imaging Global Settings					X	Controls > Defaults > Imaging > System Settings > Global Defaults
Imaging Image Explorer	X	X	X	X	X	Activities > Imaging > Image Explorer
Imaging Import DICOM	X		X	X	X	Activities > Imaging > Image Explorer > Import DICOM
Imaging Import Image	X		X	X	X	Activities > Imaging > Image Explorer > Import
Imaging Keyword List					X	Activities > Imaging > Keyword
Imaging Local Server Settings					X	Controls > Defaults > Imaging > DICOM Settings > Local Server
Imaging Manufacturers Map Settings					X	Controls > Defaults > Imaging > DICOM Settings > Manufacturers Mapping
Imaging Manufacturers Settings					X	Controls > Defaults > Imaging > DICOM Settings > Manufacturers

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Imaging Monitor Settings					X	Controls > Defaults > Imaging > System Settings > Monitor
Imaging Orientations Settings					X	Controls > Defaults > Imaging > Exam Tree Maintenance > Orientations
Imaging Presets Settings					X	Controls > Defaults > Imaging > System Settings > Presets
Imaging Re–assign Images	X		X	X	X	Activities > Imaging > Image Explorer > Reassign
Imaging Remote Servers Settings					X	Controls > Defaults > Imaging > DICOM Settings > Remote Servers
Imaging Requests List	X	X	X	X	X	Activities > Imaging > Imaging Requests and Results
Imaging Requisitions	X	X	X	X	X	Activities > Imaging > Imaging Requests
Imaging Review	X	X	X	X	X	Activities > Imaging > Image Explorer > Review
Imaging Select DICOM Printer	X		X	X	X	Activities > Imaging > DICOM Printer > Select DICOM Printer
Imaging Send DICOM	X		X	X	X	Activities > Imaging > Image Explorer > Send DICOM
Imaging Settings					X	Controls > Defaults > Imaging > System Settings > Imaging
Imaging System Setup			X		X	Controls > Defaults > Imaging
Imaging Telemedicine Queue	X	X	X	X	X	Activities > Imaging > Telemedicine Queue
Imaging Telemedicine Settings					X	Controls > Defaults > Imaging > System Settings > Telemedicine
Import Document Template					X	Tools > Import Document Templates
Inventory	X	X	X	X	X	Inventory
Inventory – Adjustment List					X	Inventory > Adjustment List
Inventory – Adjustment Reason List					X	Inventory > Adjustment Reasons
Inventory – Adjustment Reason Maintenance					X	Inventory > Adjustment Reasons
Inventory – Backorder List					X	Inventory > Backorder List
Inventory – Backorder Maintenance					X	Inventory > Backorder List
Inventory – Cost Adjustment Maintenance					X	Inventory > Adjustment List > New Cost Adjustment
Inventory – Cost Center List					X	Activities > Inventory > Settings > Cost Centers
Inventory – Cost Center Maintenance					X	Inventory > Cost Centers
Inventory – History Purge					X	Tools > Inventory Purge
Inventory – Internal Stock Use					X	Inventory > Internal Stock Use

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Inventory – Inventory Details	X	X	X	X	X	Various Locations: Invoice, Patient Visit List, Whiteboard, Prescriptions, etc.
Inventory – Inventory Reports					X	Reports > Inventory
Inventory – Item History and Item Information					X	Inventory > Item History and Item Information tab
Inventory – Location List					X	Inventory > Locations
Inventory – Location Maintenance					X	Inventory > Locations
Inventory – Order List					X	Inventory > Order List
Inventory – Order Maintenance					X	Inventory > Order List
Inventory – Purchasing Work List					X	Inventory > Purchasing Work List
Inventory – QOH Adjustment Maintenance					X	Inventory View Quantity on Hand
Inventory – Receipt List					X	Inventory > Receipt List
Inventory – Receipt Maintenance					X	Inventory > Receipt List
Inventory – Return to Vendor					X	Inventory > Return to Vendor
Inventory – Vendor List					X	Inventory > Vendors
Inventory – Vendor Maintenance					X	Inventory > Vendors
Inventory – View Quantity on Hand	X	X	X	X	X	Inventory > View Quantity on Hand
Inventory – Want List	X	X	X	X	X	Inventory > Want List
Invoice	X	X	X	X	X	Invoice icon
Invoice Departing Instructions	X	X	X	X	X	Invoice icon > Departing button
Invoice Discount	X	X	X	X	X	Invoice icon > Discount button
Invoice Discount – Apply to all lines	X	X	X	X	X	
Invoice Item Classification Information					X	Lists > Invoice Item Class > Update
Invoice Item Classification List	X	X	X	X	X	Lists > Invoice Item Class
Invoice Item Information					X	Lists > Invoice Item > Update
Invoice Item List	X	X	X	X	X	Lists > Invoice Item
Invoice Item Reports					X	Reports > Invoice Item
Invoice Item Setup					X	Tools > Invoice Item Setup
Invoice Item Subclass Information					X	Lists > Invoice Item Class > Update > Add
Invoice Item Subclass List					X	Lists > Invoice Item Class > Update
Invoice Manual Discount	X	X	X	X	X	Invoice icon > Discount button
Invoice Mark Patient as Deceased	X	X	X	X	X	Invoice icon > Special button

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Invoice Patient Sex Modification	X	X	X	X	X	Invoice icon > Special button
Invoice Patient Update Microchip ID	X	X	X	X	X	Invoice icon > Special button
Invoice Patient Visit	X	X	X	X	X	Popup Box to Transfer
Invoice Reminders	X	X	X	X	X	Invoice icon > Special button
Invoice Tax	X	X	X	X	X	Invoice icon > Tax button
Invoice Type Setup					X	Control > Invoice Types > New
Invoice Types	X	X	X	X	X	Controls > Invoice Types
Invoice Void					X	Invoice icon > Void button
Lab – Link Lab Breeds			X		X	Activities > Lab Work > Setup Lab Links > Link Breeds
Lab – Link Lab Sex			X		X	Activities > Lab Work > Setup Lab Links > Link Sexes
Lab – Link Lab Species			X		X	Activities > Lab Work > Setup Lab Links > Link Species
Lab Change Pending Requests	X		X	X	X	Lab icon > Update
Lab Defaults Test Ranges					X	Activities > Lab Work > Default Test Range
Lab Import Results by File	X		X	X	X	Activities > Lab Work > Import Lab Results by File
Lab Information					X	Activities > Lab Work > Laboratories > Update
Lab List	X		X	X	X	Activities > Lab Work > Laboratories
Lab Manually Enter Results	X		X	X	X	Activities > Lab Work > Manually Enter Results
Lab New Requests	X		X	X	X	Lab icon > New
Lab Not Requested Lab Work	X	X	X	X	X	Lab icon > Results of “Not Requested”
Lab Orphan Lab Work	X	X	X	X	X	Lab icon > Results of “Orphan”
Lab Post Orphans	X	X	X	X	X	Lab icon > Post Orphans button
Lab Profile Information					X	Activities > Lab Work > Profiles > Update
Lab Profile List	X	X	X	X	X	Activities > Lab Work > Profiles
Lab Reports	X	X	X	X	X	Reports > Lab
Lab Requests and Results	X	X	X	X	X	Lab icon
Lab Set Up Invoice Items					X	Activities > Lab Work > Setup Lab Invoice Items for New INCLINIC Instruments
Lab Template Information					X	Activities > Lab Work > Templates > Update
Lab Template List	X	X	X	X	X	Activities > Lab Work > Templates
Lab View Communication Status					X	Activities > Lab Work > Communication Status
Lab View Cumulative Results	X	X	X	X	X	Patient File icon > Right-click on result > Cumulative Results
Lab View Detailed Results	X	X	X	X	X	Patient File icon > Right-click on Result > Detailed Results

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
LabREXX* – Create IDEXX Test Request Form	X	X	X	X	X	Activities > Lab Work > Create IDEXX LabREXX Test Request Form
LabREXX – Lab Item Price Update				X	X	Activities > Lab Work > Update Lab Item Prices
LabREXX – Setup LabREXX Employee Flag					X	Activities > Lab Work > Setup IDEXX LabREXX > Set LabREXX Employee Flag
Load LifeLearn® Documents					X	Tools > Load LifeLearn Documents
Mass Markup					X	Tools > Mass Markup
Medical Notes	X	X	X	X	X	Medical Note icon
Medical Notes – Finalize	X	X	X	X	X	Medical Note icon
Merge Clients/Patients					X	Tools > Merge Clients/Patients
Message Center			X	X	X	button on toolbar
Mobile Computing – Create Database			X	X	X	Tools > Mobile Computing > Create
Mobile Computing – Mobile Computer Checkout Report			X	X	X	Tools > Mobile Computing > Mobile Computer Checkout Report
Mobile Computing – Mobile Computer List			X	X	X	Tools > Mobile Computing > Mobile Computer List
Mobile Computing – Sychronize Mobile Computing			X	X	X	Tools > Mobile Computing > Synchronize
Mobile Computing – Undo Mobile Computer			X		X	Tools > Mobile Computing > Undo Mobile Computer
Partnership Information					X	Lists > Partnerships > Update
Partnership List	X	X	X	X	X	Lists > Partnerships
Patient Advisor – Exam	X	X	X	X	X	Activities > Patient Advisor Exam OR Patient Advisor Exam icon
Patient Advisor – Exam Note	X	X	X	X	X	Patient Advisor Exam icon > New > Note
Patient Advisor – Exam Room List			X	X	X	Lists > Room
Patient Advisor – Instruction Header List	X	X	X	X	X	Lists > Patient Advisor > Instruction Headers
Patient Advisor – Instruction Header Order Setup			X		X	Lists > Patient Advisor > Instruction Header > Order button
Patient Advisor – Instruction Header Setup			X		X	Lists > Patient Advisor > Instruction Header > New
Patient Advisor – Observation Search	X	X	X	X	X	Exam Wizard Page 2 > Search button
Patient Advisor – Observation Setup			X		X	Lists > Patient Advisor > Patient Advisor Setup > Observations > New
Patient Advisor – Reports	X	X	X	X	X	Reports > Patient Advisor

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Patient Advisor – Subsystem Setup			X		X	Lists > Patient Advisor > Patient Advisor Setup > New
Patient Advisor – System Setup			X		X	Lists > Patient Advisor > Patient Advisor Setup > New
Patient Advisor – System Template			X		X	Lists > Patient Advisor > System Templates > New
Patient Advisor – System Templates	X	X	X	X	X	Lists > Patient Advisor > System Templates
Patient Advisor – Treatment Template Setup			X	X	X	Lists > Patient Advisor > Patient Advisor Setup
Patient Advisor – Update Templates by Item Descrip					X	Lists > Patient Advisor > Patient Advisor Setup
Patient Check-In/Out	X	X	X	X	X	Check–in icon
Patient Clipboard*	X	X	X	X	X	Activities > Patient Clipboard OR Patient Clipboard icon
Patient Diagnosis	X	X	X	X	X	Activities > Diagnosis
Patient File	X	X	X	X	X	Activities > Patient File OR Patient File icon
Patient Hospital Status Information			X		X	Lists > Patient Hospital Status
Patient Hospital Status List	X	X	X	X	X	Lists > Patient Hospital Status
Patient Information	X	X	X	X	X	Patient icon > New
Patient List	X	X	X	X	X	Lists > Patient OR Patient icon
Patient List – Owner Info	X	X	X	X	X	Patient icon > Update > Owner box
Patient Picture	X	X	X	X	X	Patient icon > Update > Picture box > Right-click > Update
Patient Reminders	X	X	X	X	X	Patient icon > Update > Reminders tab
Patient Reports	X	X	X	X	X	Reports > Patient
Patient Vaccine	X	X	X	X	X	Patient Clipboard > Patient Information tab > Vital Sign icon
Patient Vaccine Corrections			X	X	X	Patient Clipboard > Tags/Microchip ID tab > right-click on vaccination > Correct OR Reissue
Patient Vaccine Modification					X	Patient Clipboard > Patient Information tab > Vital Sign icon
Patient Visit List	X	X	X	X	X	Activities > Patient Visit List OR Patient Visit List icon
Patient Visit List – Invoice	X	X	X	X	X	Controls > Defaults > Practice > Practice tab
Payment – Credit/Debit Payments	X	X		X	X	Client Account icon > Payment button
Payment Type Setup					X	Controls > Payment Types > New
Payment Types	X	X	X	X	X	Controls > Payment Types
Performance Tracker					X	Reports > Performance Tracker

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Foundation Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Pharmacy – Dosage Calculator	X	X	X	X	X	Activities > Pharmacy Formulary > Dosage Calculator
Pharmacy – Drug Interaction Matrix	X	X	X	X	X	Patient Visit List icon > Pharmacy button > Drug Interaction Matrix
Pharmacy – Invoice Item Link Setup					X	Activities > Pharmacy Formulary > Pharmacy Invoice Item Link Setup
Postal Code List	X	X	X	X	X	Lists > Postal Codes
Postal Code Setup					X	Lists > Postal Codes > New
Practice List	X	X	X	X	X	Lists > Practice
Practice Reports			X	X	X	Reports > Practice
Practice Setup					X	Lists > Practice > New
Prescription Information	X	X	X	X	X	Activities > Prescription Label OR Prescription Label icon
Prescription Instruction List	X	X	X	X	X	Lists > Prescription Instructions
Prescription Instruction Setup					X	Lists > Prescription Instructions > New
Prescription Labels	X	X	X	X	X	Activities > Prescription Label OR Prescription Label icon
Prescription Labels – Apply To Invoice	X	X	X	X	X	Activities > Prescription Label > New > Apply to Invoice check box
Price Change Reason Information					X	Controls > Price Change Reason > New
Price Change Reason List	X	X	X	X	X	Controls > Price Change Reason
Printer Assignment					X	File > Printer Assignments
Problem Categories List	X	X	X	X	X	Controls > Problems > Problem Categories
Problem Category Information			X		X	Controls > Problems > Problem Categories > New
Problem List	X	X	X	X	X	Controls > Problems > Problem List
Problem List Information	X		X		X	Controls > Problems > Problem List > New
Problems for Patient	X	X	X	X	X	Activities > Problems
Reason For Visit	X	X	X	X	X	Controls > Reason for Visit
Reason For Visit Setup					X	Controls > Reason for Visit > New
Referral Classification List	X	X	X	X	X	Lists > Referrals > Classification
Referral Classification Information	X		X		X	Lists > Referrals > Classification > New
Referral Doctor Information	X	X	X	X	X	Lists > Referrals > Doctor > New
Referral Doctor List	X	X	X	X	X	Lists > Referrals > Doctor
Referral Hospital Information	X	X	X	X	X	Lists > Referrals > Hospital > New
Referral Hospital List	X	X	X	X	X	Lists > Referrals > Hospital

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	GEN	REC	DR	TECH	M/O	
Reminder – Bulk Rate Permit Setup					X	Activities > Reminder Selection > Reminder Print Options > Reminder Bulk Rate Permit Setup
Reminder Alignment					X	Activities > Reminder Selection > Reminder Print Options > Two OR Three OR Four Card Reminder Alignment
Reminder Message Setup					X	Activities > Reminder Selection > Reminder Print Options > Reminder Message Setup
Revenue Center Information					X	Lists > Revenue Centers > New
Revenue Center List	X	X	X	X	X	Lists > Revenue Centers
Room Setup					X	Lists > Room > New
Rooms	X	X	X	X	X	Lists > Room
Setup Daily Entries Report					X	Controls > Default > Practice > End of Period tab > Setup Daily Entries Report
Sex	X	X	X	X	X	Controls > Sex
Sex Setup					X	Controls > Sex > Update
Signature Capture Device	X	X	X	X	X	Tools > Capture Device
Snapshot					X	Reports > Snapshot
Species List	X	X	X	X	X	Lists > Species
Species Setup					X	Lists > Species > Update
Split Partnership Invoices	X	X		X	X	N/A
Staff Class Commission					X	Lists > Staff Classification Commission
Staff Commission					X	Lists > Staff Commission
Staff Information					X	Lists > Staff > New
Staff List	X		X	X	X	Lists > Staff
Staff Reports			X	X	X	Reports > Staff
Switch Logged in Practice[2]	X	X	X	X	X	File > Switched Logged in Practice
Synchronize LifeLearn® Documents					X	Tools > Synchronize LifeLearn Documents
Tax Setup					X	Controls > Taxes > New
Taxes					X	Controls > Taxes
Travel Sheet – List/Setup					X	Lists > Travel Sheets > Update
Travel Sheet – Update/Create Sample					X	Tools > Update/Create > Sample Travel Sheet
Unit of Measure	X	X	X	X	X	Controls > Units of Measure
Unit of Measure Setup					X	Controls > Unit of Measure > New
Update Revenue Centers					X	Tools > Update Revenue Centers
User Defined Prompt Setup					X	Controls > User Defined Prompts > New
User Defined Prompts					X	Controls > User Defined Prompts

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	GEN	REC	DR	TECH	M/O	
View Inventory Cost	X	X	X	X	X	Lists > Invoice Item List
Vital Sign – Setup					X	Lists > Vital Signs/Weight > New Lists > Vital Signs/Weight > select a vital sign > Update
Vital Sign – Add (>24 hours)	X	X	X	X	X	Activities > Vital Signs/Weight
Vital Sign – Add (within 24 hours)	X	X	X	X	X	Activities > Vital Signs/Weight
Vital Sign – Edit Existing (within 24 hours)	X	X	X	X	X	Activities > Vital Signs/Weight
Vital Sign – Void	X	X	X	X	X	Activities > Vital Signs/Weight > Right-click on entry > Void
Ward/Loc Information					X	Lists > Ward/Loc
Ward/Loc List	X	X	X	X	X	Lists > Ward/Loc
Whiteboard	X	X	X	X	X	Activities > Electronic Whiteboard > Whiteboard
Whiteboard Alert List	X	X	X	X	X	List > Electronic Whiteboard > Alerts
Whiteboard Area Information					X	Lists > Electronic Whiteboard > Areas
Whiteboard Area List	X	X	X	X	X	Lists > Electronic Whiteboard > Areas
Whiteboard Category Information					X	Lists > Electronic Whiteboard > Categories
Whiteboard Category List	X	X	X	X	X	Lists > Electronic Whiteboard > Categories
Whiteboard Complete Task	X	X	X	X	X	Lists > Electronic Whiteboard > Categories
Whiteboard Frequency Information					X	Lists > Electronic Whiteboard > Frequencies
Whiteboard Frequency List	X	X	X	X	X	Lists > Electronic Whiteboard > Frequencies
Whiteboard Invoice Posting Override			X		X	Activities > Invoice (message displays) Lists > Electronic Whiteboard (to change status)
Whiteboard Orders Override Defaults			X		X	Controls > Defaults > Practice and Workstation > Workstation
Whiteboard Orders Override Frequency			X		X	Controls > Defaults > Practice and Workstation > Whiteboard
Whiteboard Patient Orders	X	X	X	X	X	Activities > Electronic Whiteboard > Patient Orders
Whiteboard Patient Treatments	X	X	X	X	X	Activities > Electronic Whiteboard
Whiteboard Patient Visit List (PVL)	X	X	X	X	X	Patient Clipboard > Select Client > Right-click Patient > Electronic Whiteboard > Patient Orders > PVL
Whiteboard Remove Patient			X	X	X	Whiteboard > Right-click patient > Remove from Whiteboard
Whiteboard Undo Treatment	X	X	X	X	X	Patient Clipboard > Select Client > Right-click Patient > Electronic Whiteboard > Right-click Treatment > Select Patient Orders > Right-click Patient Order > Discontinue treatment

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Animal Without Birthdates	X	X	X	X	X	Reports > Patient > Animals Without Birthdates
Animals Without Weight	X	X	X	X	X	Reports > Patient > Animals Without Weight
Appointment – Appointments Report	X	X	X	X	X	Reports > Appointment Scheduler > Appointments Report
Appointment – Appointments Report – Summary	X	X	X	X	X	Reports > Appointment Scheduler > Appointments Report – Summary
Appointment – Practice and Staff Hours Report					X	Reports > Appointment Scheduler > Practice & Staff Hours Report
Appointment – Scheduled vs. Goal Report					X	Reports > Appointment Scheduler > Scheduled vs. Goal Report
Appointment – Tickler File Report	X	X	X	X	X	Reports > Appointment Scheduler > Tickler File Report
Barn Reminder Letter Report	X	X	X	X	X	Reports > Equine > Barn Reminder Letter Report
Barn Reminder Recall Report	X	X	X	X	X	Reports > Equine > Barn Reminder Recall Report
Barn Reminder Report	X	X	X	X	X	Reports > Equine > Barn Reminder Report
Barn Report	X	X	X	X	X	Reports > Equine > Barn Report
Birthday Report	X	X	X	X	X	Reports > Patient > Birthday Report
Boarding Cancelled List	X	X	X	X	X	Reports > Boarding > Boarding Cancelled List
Boarding Census	X	X	X	X	X	Reports > Boarding > Boarding Census
Boarding Check-in Report	X	X	X	X	X	Reservation List icon > Right-click on a reservation > Print > Check In Report
Boarding Combination List	X	X	X	X	X	Reports > Boarding > Boarding Combination List
Boarding Exercise List	X	X	X	X	X	Reports > Boarding > Boarding Exercise List
Boarding Expected Check-ins	X	X	X	X	X	Reports > Boarding > Boarding Expected Check-ins
Boarding Expected Check-outs	X	X	X	X	X	Reports > Boarding > Boarding Expected Check-outs
Boarding Feeding List	X	X	X	X	X	Reports > Boarding > Boarding Feeding List
Boarding Medication List	X	X	X	X	X	Reports > Boarding > Boarding Medications List
Boarding No Shows	X	X	X	X	X	Reports > Boarding > Boarding No Shows
Boarding Occupancy Forecast Report	X	X	X	X	X	Reports > Boarding > Boarding Occupancy Forecast Report
Boarding Other Services List	X	X	X	X	X	Reports > Boarding > Boarding Other Services List
Boarding Res Recurrence Exception Report	X	X	X	X	X	Automatically prints if you double book
Boarding Res Recurrence Report	X	X	X	X	X	Prompt box during recurring process
Boarding Scheduled Reservations Report	X	X	X	X	X	Reservation List icon > Right-click on a reservation > Print > Scheduled Reservation
Census Report	X	X	X	X	X	Reports > Patient > Census Report
Checked-in Census Report	X	X	X	X	X	Reports > Patient > Checked-in Census Report

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Foundation Reports Security	Access Suggestions GEN	REC	DR	TECH	M/O	Path to Locate
Check-in Report	X	X	X	X	X	Prints when Patient is Checked in
Client A/R Information					X	Reports > Client > Client A/R Information
Client Account History					X	Reports > Client > Client Account History
Client Discounts					X	Reports > Client > Client Discounts
Client Master Report					X	Reports > Client > Client Master Report
Client Prompts					X	Reports > Client > Client Prompts
Client/Patient Master Report					X	Reports > Client > Client/Patient Master Report
Compliance – Client List (Future Appointments)					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Future Appointments
Compliance – Client List (Missing Services)					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Missing Services
Compliance – Client List (Services Provided)					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Service Provided
Compliance – Dollar Value Sold by Staff Member					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Dollar Value Sold by Staff
Compliance – Dollar Value Sold by Staff Member (graph)					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Dollar Value Sold by Staff (Graph)
Compliance – Missing Dependents					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Missing Dependents
Compliance – Protocol Summary					X	Reports > Compliance Assessment Tool > Protocol Setup Wizard > Protocol Summary
Compliance – Services Sold by Staff Member					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Services Sold by Staff Member
Compliance – Services Sold by Staff Member (graph)					X	Reports > Compliance Assessment Tool > Generate Compliance Results > Services Sold by Staff Member (Graph)
Compliance Report					X	Reports > Invoice Item > Compliance Report
Controlled Substance Report	X	X	X	X	X	Reports > Invoice Item > Controlled Substance Report
Deceased Patient Report	X	X	X	X	X	Reports > Patient > Deceased Patient Report
Departing Instructions	X	X	X	X	X	Reports > Invoice Item > Departing Instructions
Diagnostic Code Report	X		X	X	X	Reports > Practice > Diagnostic Code Report
EOD – Charged on Account Report	X	X			X	Reports > End of Period > End of Day > Charged on Account Report
EOD – Current Activity Report	X	X			X	Reports > End of Period > End of Day > Current Activity
EOD – Daily Audit Trail	X	X			X	Reports > End of Period > End of Day > Daily Audit Trail

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOD – Daily Deposit Report	X	X			X	Reports > End of Period > End of Day > Daily Deposit Report
EOD – Daily Discount Report – By Discount	X	X			X	Reports > End of Period > End of Day > Daily Discount Report – By Discount
EOD – Daily Discount Report – By Staff	X	X			X	Reports > End of Period > End of Day > Daily Discount Report – By Staff
EOD – Daily Inv. and PVL Entries	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries
EOD – Daily Inv. and PVL Entries – by Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Class
EOD – Daily Inv. and PVL Entries – by Invoice	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Invoice
EOD – Daily Inv. and PVL Entries – by Rev, Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Rev, Class
EOD – Daily Inv. and PVL Entries – by Rev, Invoice	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Rev, Invoice
EOD – Daily Inv. and PVL Entries – by Rev, Staff	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Rev, Staff
EOD – Daily Inv. and PVL Entries – by Rev, Staff, Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Rev, Staff, Class
EOD – Daily Inv. and PVL Entries – by Staff	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Staff
EOD – Daily Inv. and PVL Entries – by Staff, Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Entries – by Staff, Class
EOD – Daily Inv. and PVL Totals – by Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Totals – by Class
EOD – Daily Inv. and PVL Totals – by Rev, Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Totals – by Rev, Class
EOD – Daily Inv. and PVL Totals – by Rev, Staff	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Totals – by Rev, Staff
EOD – Daily Inv. and PVL Totals – by Rev, Staff, Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Totals – by Rev, Staff, Class
EOD – Daily Inv. and PVL Totals – by Staff	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Totals – by Staff
EOD – Daily Inv. and PVL Totals – by Staff, Class	X	X			X	Reports > End of Period > End of Day > Daily Inv. And PVL Totals – by Staff, Class
EOD – Daily Invoicing Entries	X	X			X	Reports > End of Period > End of Day > Daily Invoicing Entries
EOD – Daily Manual Discount Report – By Client	X	X			X	Reports > End of Period > End of Day > Daily Manual Discount Report – By Client
EOD – Daily Manual Discount Report – By Staff	X	X			X	Reports > End of Period > End of Day > Daily Manual Discount Report – By Staff

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Foundation Reports Security	Access Suggestions GEN	REC	DR	TECH	M/O	Path to Locate
EOD – Daily Patient Visit List Entries	X	X			X	Reports > End of Period > End of Day > Daily Patient Visit List Entries
EOD – Daily Payment Register – By Cashier By Client ID	X	X			X	Reports > End of Period > End of Day > Daily Payment Register – By Cashier ID
EOD – Daily Payment Register – By Cashier By Payment Type	X	X			X	Reports > End of Period > End of Day > Daily Payment Register – By Client By Payment Type
EOD – Daily Payment Register – By Client Last Name	X	X			X	Reports > End of Period > End of Day > Daily Payment Register – By Client Last Name
EOD – Daily Payment Register – By Payment Type	X	X			X	Reports > End of Period > End of Day > Daily Payment Register – By Payment Type
EOD – Daily Payment Register – Credit/Debit Payment Transactions	X	X			X	Reports > End of Period > End of Day
EOD – Daily Revenue Report	X	X			X	Reports > End of Period > End of Day > Daily Revenue Report
EOD – Daily Staff Commission Detail Report – Gross			X		X	Reports > End of Period > End of Day > Daily Staff Commission Detailed Report – Gross
EOD – Daily Staff Commission Detail Report – Net			X		X	Reports > End of Period > End of Day > Daily Staff Commission Detailed Report–Net
EOD – Daily Staff Commission Summary Report – Gross			X		X	Reports > End of Period > End of Day > Daily Staff Commission Summary Report – Gross
EOD – Daily Staff Commission Summary Report – Net			X		X	Reports > End of Period > End of Day > Daily Staff Commission Summary Report – Net
EOD – Daily Staff Commission Totals Report – Gross			X		X	Reports > End of Period > End of Day > Daily Staff Commission Totals Report–Gross
EOD – Daily Staff Commission Totals Report – Net			X		X	Reports > End of Period > End of Day > Daily Staff Commission Totals Report – Net
EOD – Daily Summary Report[3]	X	X			X	Reports > End of Period > End of Day > Daily Summary Report
EOD – Daily Summary Tax Report	X	X			X	Reports > End of Period > End of Day > Daily Summary Tax Report
EOD – Daily Voided Invoices Report by Client ID	X	X			X	Reports > End of Period > End of Day > Daily Voided Invoices Report by Client ID
EOD – Daily Voided Invoices Report by Date	X	X			X	Reports > End of Period > End of Day > Daily Voided Invoices Report by Date
EOD – Daily Voided Invoices Report by Staff	X	X			X	Reports > End of Period > End of Day > Daily Voided Invoices Report by Staff
EOD – Deposit Report – Checks – By Check No./Answer	X	X			X	Reports > End of Period > End of Day > Deposit Report – Check – By Check No./Answer
EOD – Deposit Report – Checks – By Client ID	X	X			X	Reports > End of Period > End of Day > Deposit Report – Checks – By Client ID

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOD – Deposit Report – Checks – By Client Last Name	X	X			X	Reports > End of Period > End of Day > Deposit Report – Checks – By Client Last Name
EOD – GL Batch Report	X	X			X	Reports > End of Period > End of Day > GL Batch Report
EOD – Invoice Register – Closed Invoices	X	X			X	Reports > End of Period > End of Day > Invoice Register – Close Invoices
EOD – Invoice Register – Open Invoices	X	X			X	Reports > End of Period > End of Day > Invoice Register – Open Invoices
EOD – Itemized Audit Trail	X	X			X	Reports > End of Period > End of Day > Itemized Audit Trail
EOD – Itemized Audit Trail for Revenue Center	X	X			X	Reports > End of Period > End of Day > Itemized Audit Trail for Revenue Center
EOD – New Client Report – By Client ID[3]	X	X			X	Reports > End of Period > End of Day > New Client Report – By Client ID
EOD – New Client Report – By Client Last Name[3]	X	X			X	Reports > End of Period > End of Day > New Client Report – By Client Last Name
EOD – Patient Documents Finalized by EOD[3]	X	X	X		X	Reports > End of Period > End of Day > Patient Documents Finalized by EOD
EOD – Patient Visit List By Date	X	X			X	Reports > End of Period > End of Day > Patient Visit List By Date
EOD – Patient Visit List By Type	X	X			X	Reports > End of Period > End of Day > Patient Visit By Type
EOD – Returned Check Report – By Client ID	X	X			X	Reports > End of Period > End of Day > Returned Check Report – By Client ID
EOD – Returned Check Report – By Client Last Name	X	X			X	Reports > End of Period > End of Day > Returned Check Report – By Client Last Name
EOD – Sales Tax Summary – By Revenue Center	X	X			X	Reports > End of Period > End of Day > Sales Tax Summary – By Revenue Center
EOD – Serv. and Inv. Sales – Closed Invoices – By Class Desc.	X	X			X	Reports > End of Period > End of Day > Serv. And Inv. Sales – Closed Invoice – By Class Desc.
EOD – Serv. and Inv. Sales – Closed Invoices – By Class ID	X	X			X	Reports > End of Period > End of Day > Serv. And Inv. Sales – Closed Invoices – By Class ID
EOD – Serv. and Inv. Sales – Closed Invoices – By Staff ID	X	X			X	Reports > End of Period > End of Day > Serv. And Inv. Sales – Closed Invoices – By Staff ID
EOD – Serv. and Inv. Sales – Closed Invoices – By Staff Name	X	X			X	Reports > End of Period > End of Day > Serv. And Inv. Sales – Closed Invoices – By Staff Name
EOD – Serv. And Inv. Sales by Revenue Center – Class Desc.	X	X			X	Reports > End of Period >End of Day > Serv. And Inv. Sales by Revenue Center – Class Desc.
EOD – Serv. And Inv. Sales by Revenue Center – Class ID	X	X			X	Reports > End of Period > End of Day > Serv. And Inv. Sales by Revenue Center – Class ID

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOD – Serv. And Inv. Sales by Revenue Center – Staff ID	X	X			X	Reports > End of Period > End of Day > Serv. And Inv. Sales by Revenue Center – Staff ID
EOD – Serv. And Inv. Sales by Revenue Center – Staff Last Name	X	X			X	Reports > End of Period > End of Day > Serv. And Inv. Sales by Revenue Center – Staff Last Name
EOD – Standard Fee Exception Report – By Item Description	X	X			X	Reports > End of Period > End of Day > Standard Fee Exception Report – By Item Description
EOD – Standard Fee Exception Report – By Item ID	X	X			X	Reports > End of Period > End of Day > Standard Fee Exception Report – By Item ID
EOD – Standard Fee Exception Summary	X	X			X	Reports > End of Period > End of Day > Standard Fee Exception Summary
EOD – Statistics By Species – Closed Invoices	X	X			X	Reports > End of Period > End of Day > Statistics By Species – Closed Invoices
EOD – Statistics By Staff – Closed Invoices	X	X			X	Reports > End of Period > End of Day > Statistics By Staff – Closed Invoices
EOM – Accounts Receivable Report – By Client ID[3]					X	Reports > End of Period > End of Month > Accounts Receivable Report – By Client ID
EOM – Accounts Receivable Report – By Client Name					X	Reports > End of Period > End of Month > Accounts Receivable Report – By Client Name
EOM – Accounts Receivable Status Report – Closed Invoices					X	Reports > End of Period > End of Month > Accounts Receivable Status Report – Closed Invoices
EOM – Aged Accounts Receivable Report by Staff[3]					X	Reports > End of Period > End of Month > Aged Accounts Receivable Report By Staff
EOM – Cost of Goods Sold by Center, Class					X	Reports > End of Period > End of Month > Cost of Goods Sold by Center, Class
EOM – Cost of Goods Sold by Center, Class, Item					X	Reports > End of Period > End of Month > Cost of Goods Sold by Center, Class, Item
EOM – Cost of Goods Sold by Center, Inv. Location, Class, Item					X	Reports > End of Period > End of Month > Cost of Goods Sold by Center, Inv. Location, Class, Item
EOM – Cost of Goods Sold by Class					X	Reports > End of Period > End of Month > Cost of Goods Sold by Center, Class
EOM – Cost of Goods Sold by Class, Item					X	Reports > End of Period > End of Month > Cost of Goods Sold by Center, Class, Item
EOM – Cost of Goods Sold by Inv. Location, Class, Item					X	Reports > End of Period > End of Month > Cost of Goods Sold by Inv. Location, Class, Item
EOM – Finance Charge Report – By Client ID					X	Reports > End of Period > End of Month > Finance Charge Report – By Client ID
EOM – Finance Charge Report – By Client Last Name					X	Reports > End of Period > End of Month > Finance Charge Report – By Client Last Name
EOM – GL Batch Report					X	Reports > End of Period > End of Month > GL Batch Report

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOM – Inventory Sales Report – Closed Invoices – By Class By Desc.					X	Reports > End of Period > End of Month > Inventory Sales Report – Closed Invoices – By Class By Desc.
EOM – Inventory Sales Report – Closed Invoices – By Class By ID					X	Reports > End of Period > End of Month > Inventory Sales Report – Closed Invoices – By Class By ID
EOM – Inventory Sales Report by Revenue Center – by Class by Desc.					X	Reports > End of Period > End of Month > Inventory Sales Report by Revenue Center – By Class By Desc.
EOM – Inventory Sales Report by Revenue Center – by Class by ID					X	Reports > End of Period > End of Month > Inventory Sales Report by Revenue Center – By Class By ID
EOM – Monthly Adjustment Summary – By Client ID					X	Reports > End of Period > End of Month > Monthly Adjustment Summary – By Client ID
EOM – Monthly Adjustment Summary – By Client Last Name					X	Reports > End of Period > End of Month > Monthly Adjustment Summary – By Client Last Name
EOM – Monthly Clients With Open Invoices – By Client ID					X	Reports > End of Period > End of Month > Monthly Clients With Open Invoices – By Client ID
EOM – Monthly Clients With Open Invoices – By Invoice No.					X	Reports > End of Period > End of Month > Monthly Clients with Open Invoices – By Invoice No.
EOM – Monthly Deposit Report					X	Reports > End of Period > End of Month > Monthly Deposit Report
EOM – Monthly Discount Report – By Discount					X	Reports > End of Period > End of Month > Monthly Discount Report – By Discount
EOM – Monthly Discount Report – By Staff					X	Reports > End of Period > End of Month > Monthly Discount Report – By Staff
EOM – Monthly Invoices And Statements					X	Reports > End of Period > End of Month > Monthly Invoices and Statements
EOM – Monthly Manual Discount Report – By Client					X	Reports > End of Period > End of Month > Monthly Manual Discount Report – By Client
EOM – Monthly Manual Discount Report – By Staff					X	Reports > End of Period > End of Month > Monthly Manual Discount Report – By Staff
EOM – Monthly Sales Summary[3]					X	Reports > End of Period > End of Month > Monthly Sales Summary
EOM – Monthly Staff Commission Detail Report – Gross			X		X	Reports > End of Period > End of Month > Monthly Staff Commission Detail Report – Gross
EOM – Monthly Staff Commission Detail Report – Net			X		X	Reports > End of Period > End of Month > Monthly Staff Commission Detail Report – Net
EOM – Monthly Staff Commission Summary Report – Gross			X		X	Reports > End of Period > End of Month > Monthly Staff Commission Summary Report – Gross

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Foundation Reports Security	Access Suggestions GEN	REC	DR	TECH	M/O	Path to Locate
EOM – Monthly Staff Commission Summary Report – Net			X		X	Reports > End of Period > End of Month > Monthly Staff Commission Summary Report – Net
EOM – Monthly Staff Commission Totals Report – Gross			X		X	Reports > End of Period > End of Month > Monthly Staff Commission Totals Report – Gross
EOM – Monthly Staff Commission Totals Report – Net			X		X	Reports > End of Period > End of Month > Monthly Staff Commission Totals Report – Net
EOM – Monthly Voided Invoices Report by Client ID					X	Reports > End of Period > End of Month > Monthly Voided Invoices Report by Client ID
EOM – Monthly Voided Invoices Report by Date					X	Reports > End of Period > End of Month > Monthly Voided Invoices Report by Date
EOM – Monthly Voided Invoices Report by Staff					X	Reports > End of Period > End of Month > Monthly Voided Invoices Report by Staff
EOM – New Client Report – By Client ID[3]					X	Reports > End of Period > End of Month > New Client Report – By Client ID
EOM – New Client Report – By Client Last Name[3]					X	Reports > End of Period > End of Month > New Client Report – By Client Last Name
EOM – Productivity By Staff					X	Reports > End of Period > End of Month > Productivity By Staff
EOM – Referral Report – by Staff					X	Reports > End of Period > End of Month > Referral Report – By Staff
EOM – Referral Report – Doctor by Hospital					X	Reports > End of Period > End of Month > Referral Report – Doctor by Hospital
EOM – Referral Report – Hospital by Doctor					X	Reports > End of Period > End of Month > Referral Report – Doctor by Hospital
EOM – Referral Revenue Report by Doctor by Revenue Center					X	Reports > End of Period > End of Month > Referral Revenue Report by Doctor by Revenue Center
EOM – Referral Revenue Report by Hospital by Revenue Center					X	Reports > End of Period > End of Month > Referral Revenue Report by Hospital by Revenue Center
EOM – Referral Revenue Report by Rev Center by Doctor by Hospital					X	Reports > End of Period > End of Month > Referral Revenue Report by Rev Center by Doctor by Hospital
EOM – Referral Revenue Report by Rev Center by Hospital by Doctor					X	Reports > End of Period > End of Month > Referral Revenue Report by Rev Center by Hospital by Doctor
EOM – Referral Summary – by Doctor					X	Reports > End of Period > End of Month > Referral Summary by Doctor
EOM – Referral Summary – by Hospital					X	Reports > End of Period > End of Month > Referral Summary by Hospital
EOM – Referral Summary – Doctor by Hospital					X	Reports > End of Period > End of Month > Referral Summary by Doctor by Hospital

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOM – Referral Summary – Hospital by Doctor					X	Reports > End of Period > End of Month > Referral Summary – Hospital by Doctor
EOM – Referral Summary by Revenue Center – Doctor by Hospital					X	Reports > End of Period > End of Month > Referral Summary by Revenue Center – Doctor by Hospital
EOM – Referral Summary by Revenue Center – Hospital by Doctor					X	Reports > End of Period > End of Month > Referral Summary by Revenue Center – Hospital by Doctor
EOM – Returned Check Summary					X	Reports > End of Period > End of Month > Returned Check Summary
EOM – Sales Tax Summary – By Revenue Center					X	Reports > End of Period > End of Month > Sales Tax Summary – By Revenue Center
EOM – Sales Tax Summary/ Income Reconciliation – Closed Invoices					X	Reports > End of Period > End of Month > Sales Tax Summary/Income Reconciliation – Closed Invoices
EOM – Serv. and Inv. Sales – Closed Inv. – By Class Desc.					X	Reports > End of Period > End of Month > Serv. And Inv. Sales – Closed Inv. – By Class Desc.
EOM – Serv. and Inv. Sales – Closed Inv. – By Class ID					X	Reports > End of Period > End of Month > Serv. And Inv. Sales – Closed Inv. – By Class ID
EOM – Serv. and Inv. Sales – Closed Inv. – By Staff ID					X	Reports > End of Period > End of Month > Serv. And Inv. Sales – Closed Inv. – By Staff ID
EOM – Serv. and Inv. Sales – Closed Inv. – By Staff Last Name					X	Reports > End of Period > End of Month > Serv. And Inv. Sales – Closed Inv. – By Staff Last Name
EOM – Serv. And Inv. Sales by Revenue Center – Class Desc.					X	Reports > End of Period > End of Month > Serv. And Inv. Sales by Revenue Center – Class Desc.
EOM – Serv. And Inv. Sales by Revenue Center – Class ID					X	Reports > End of Period > End of Month > Serv. And Inv. Sales by Revenue Center – Class ID
EOM – Serv. And Inv. Sales by Revenue Center – Staff ID					X	Reports > End of Period > End of Month > Serv. And Inv. Sales by Revenue Center – Staff ID
EOM – Serv. And Inv. Sales by Revenue Center – Staff Last Name					X	Reports > End of Period > End of Month > Serv. And Inv. Sales by Revenue Center – Staff Last Name
EOM – Serv. Sales Report – Closed Invoices – By Class By Desc.					X	Reports > End of Period > End of Month > Serv. Sales Report – Closed Invoices – By Class By Desc
EOM – Serv. Sales Report – Closed Invoices – By Class By ID					X	Reports > End of Period > End of Month > Serv. Sales Report – Closed Invoices – By Class By ID
EOM – Serv. Sales Report by Revenue Center – By Class by Desc.					X	Reports > End of Period > End of Month > Serv. Sales Report by Revenue Center – by Class by Desc.

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Foundation Reports Security	Access Suggestions GEN	REC	DR	TECH	M/O	Path to Locate
EOM – Serv. Sales Report by Revenue Center – By Class by ID					X	Reports > End of Period > End of Month > Serv. Sales Report by Revenue Center – by Class by ID
EOM – Split Invoices Report					X	Reports > End of Period > End of Month > Split Invoices Report
EOM – Statistics By Species Report – Closed Invoices					X	Reports > End of Period > End of Month > Statistics By Species Report–Closed Invoices
EOM – Statistics By Staff Report – Closed Invoices					X	Reports > End of Period > End of Month > Statistics By Staff Report – Closed Invoices
EOM – YTD Net Sales by Center					X	Reports > End of Period > End of Month > YTD Net Sales By Center
EOM – YTD Net Sales by Center, Class					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Class
EOM – YTD Net Sales by Center, Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Class, Item
EOM – YTD Net Sales by Center, Class, Subclass					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Class Subclass
EOM – YTD Net Sales by Center, Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Class, Subclass, Item
EOM – YTD Net Sales by Center, Staff					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Staff
EOM – YTD Net Sales by Center, Staff, Class					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Staff, Class
EOM – YTD Net Sales by Center, Staff, Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Staff, Class, Item
EOM – YTD Net Sales by Center, Staff, Class, Subclass					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Staff, Class, Subclass
EOM – YTD Net Sales by Center, Staff, Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Staff, Class, Subclass, Item
EOM – YTD Net Sales by Center, Staff, Type, Class					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Staff, Type Class
EOM – YTD Net Sales by Center, Staff, Type, Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center Staff, Type Class, Item
EOM – YTD Net Sales by Center, Staff, Type, Class, Subclass					X	Reports > End of Period > End of Month > YTD Net Sales By Center Staff, Type Class, Subclass
EOM – YTD Net Sales by Center, Staff, Type, Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Staff, Type, Class, Subclass, Item
EOM – YTD Net Sales by Center, Type					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Type

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOM – YTD Net Sales by Center, Type, Class					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Type, Class
EOM – YTD Net Sales by Center, Type, Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Type, Class, Item
EOM – YTD Net Sales by Center, Type, Class, Subclass					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Type, Class, Subclass
EOM – YTD Net Sales by Center, Type, Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Center, Type, Class, Subclass, Item
EOM – YTD Net Sales by Class					X	Reports > End of Period > End of Month > YTD Net Sales By Class
EOM – YTD Net Sales by Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Class, Item
EOM – YTD Net Sales by Class, Subclass					X	Reports > End of Period > End of Month > YTD Net Sales By Class, Subclass
EOM – YTD Net Sales by Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Class, Subclass, Item
EOM – YTD Net Sales by Staff					X	Reports > End of Period > End of Month > YTD Net Sales By Staff
EOM – YTD Net Sales by Staff, Class					X	Reports > End of Period > End of Month > YTD Net Sales By Staff, Class
EOM – YTD Net Sales by Staff, Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Staff, Class, Item
EOM – YTD Net Sales by Staff, Class, Subclass					X	Reports > End of Period > End of Month > YTD Net Sales By Staff, Class, Subclass
EOM – YTD Net Sales by Staff, Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Staff, Class, Subclass, Item
EOM – YTD Net Sales by Staff, Type, Class					X	Reports > End of Period > End of Month > YTD Net Sales By Staff, Type, Class
EOM – YTD Net Sales by Staff, Type, Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Staff, Type, Class, Item
EOM – YTD Net Sales by Staff, Type, Class, Subclass					X	Reports>End of Period>End of Month >YTD Net Sales By Staff, Type, Class, Subclass
EOM – YTD Net Sales by Staff, Type, Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Staff, Type Class, Subclass, Item
EOM – YTD Net Sales by Type, Class					X	Reports > End of Period > End of Month > YTD Net Sales By Type, Class
EOM – YTD Net Sales by Type, Class, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Type, Class, Item
EOM – YTD Net Sales by Type, Class, Subclass					X	Reports > End of Period > End of Month > YTD Net Sales By Type, Class, Subclass

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOM – YTD Net Sales by Type, Class, Subclass, Item					X	Reports > End of Period > End of Month > YTD Net Sales By Type, Class, Subclass, Item
EOY – Account Write-Off Report – By Client ID					X	Reports > End of Period > End of Year > Account Write-Off Report – By Client ID
EOY – Account Write–Off Report – By Client Last Name					X	Reports > End of Period > End of Year > Account Write–Off Report – By Client Last Name
EOY – Client Sales Report – Closed Invoices – By Client ID					X	Reports > End of Period > End of Year > Client Sales Report – Closed Invoices – By Client ID
EOY – Client Sales Report – Closed Invoices – By Client Name					X	Reports > End of Period > End of Year > Client Sales Report – Closed Invoices – By Client Name
EOY – Finance Charge Report – By Client ID					X	Reports > End of Period > End of Year > Finance Charge Report – By Client ID
EOY – Finance Charge Report – By Client Last Name					X	Reports > End of Period > End of Year > Finance Charge Report–By Client Last Name
EOY – High/Low Client Sales Report					X	Reports > End of Period > End of Year > High/Low Client Sales Report
EOY – Inventory Sales Report – Closed Invoices – By Class By Desc.					X	Reports > End of Period > End of Year > Inventory Sales Report – Closed Invoices – By Class By Desc.
EOY – Inventory Sales Report – Closed Invoices – By Class By ID					X	Reports > End of Period > End of Year > Inventory Sales Report – Closed Invoices – By Class By ID
EOY – New Client Report – By Client ID[3]					X	Reports > End of Period > End of Year > New Client Report – By Client ID
EOY – New Client Report – By Client Last Name[3]					X	Reports > End of Period > End of Year > New Client Report – By Client Last Name
EOY – Sales Tax Summary By Revenue Center					X	Reports > End of Period > End of Year > Sales Tax Summary By Revenue Center
EOY – Sales Tax Summary/ Income Reconciliation – Closed Invoices					X	Reports > End of Period > End of Year > Sales Tax Summary/Income Reconciliation – Closed Invoices
EOY – Serv. Sales Report – Closed Invoices – By Class By Desc.					X	Reports > End of Period > End of Year > Serv. Sales Report – Closed Invoices – By Class By Desc.
EOY – Serv. Sales Report – Closed Invoices – By Class By ID					X	Reports > End of Period > End of Year > Serv. Sales Report – Closed Invoices – By Class By ID
EOY – Statistics By Species Report – Closed Invoices					X	Reports> End of Period > End of Year > Statistics By Species Report – Closed Invoices
EOY – Statistics By Staff Report – Closed Invoices					X	Reports > End of Period > End of Year > Statistics By Staff Report – Closed Invoices

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOY – Yearly Clients With Open Invoices – By Client ID					X	Reports > End of Period > End of Year > Yearly Clients With Open Invoices – By Client ID
EOY – Yearly Clients With Open Invoices – By Invoice No.					X	Reports > End of Period > End of Year > Yearly Clients with Open Invoices – By Invoice No.
EOY – Yearly Sales Summary[3]					X	Reports > End of Period > End of Year > Yearly Sales Summary
Estimates	X	X	X	X	X	Estimate icon
Feeding Guide Instructions	X	X	X	X	X	Activities > Feeding Guide > Feeding Guide Profile
Grooming Report	X	X	X	X	X	N/A
Image Request Special Action Item Report					X	Reports > Invoice Item > Image Request Special Action Item Report
Imaging – Image Only	X		X	X	X	Activities > Images > Patient Images > Print button
Imaging – Image With Comments	X		X	X	X	Activities > Images > Patient Images > Print button
Imaging – Image Without Comments	X	X	X	X	X	Activities > Images > Patient Images > Print button
Imaging – Multiple Images	X	X	X	X	X	Activities > Images > Patient Images > Print button
Imaging – Multiple Pages Report	X	X	X	X	X	Activities > Imaging > Image Explorer
Initial Client Setup Report					X	Reports > Client > Initial Client Setup Report
Initial Patient Setup					X	Reports > Patient > Initial Patient Setup
Initial Practice Setup Report By Billing Messages					X	Reports > Practice > Initial Practice Setup Report By Billing Messages
Initial Practice Setup Report By Credit Codes					X	Reports > Practice > Initial Practice Setup Report By Credit Codes
Initial Practice Setup Report By Estimate Messages					X	Reports > Practice > Initial Practice Setup Report By Estimate Messages
Initial Staff Setup Report					X	Reports > Staff > Initial Staff Setup Report
Inventory – Adjustment Report					X	Reports > Inventory > Inventory – Adjustment Report
Inventory – Audit Open Details Report					X	Reports > Inventory > Inventory – Audit Open Details Report
Inventory – Audit Report					X	Reports > Inventory > Inventory – Audit Report
Inventory – Backorder Report					X	Reports > Inventory > Inventory – Backorder Report
Inventory – Cost Report					X	Reports > Inventory > Inventory – Cost Report
Inventory – Cost Totals Report					X	Reports > Inventory > Inventory – Cost Totals Report
Inventory – Counts Report					X	Reports > Inventory > Inventory – Counts Report
Inventory – Evaluation Report					X	Reports > Inventory > Inventory – Evaluation Report

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Foundation Reports Security	Access Suggestions GEN	REC	DR	TECH	M/O	Path to Locate
Inventory – Expiration Date Report					X	Reports > Inventory > Inventory – Expiration Date Report
Inventory – Internal Usage Report					X	Reports > Inventory > Inventory – Internal Usage Report
Inventory – Item Vendor Information Report					X	Reports > Inventory > Inventory – Item Vendor Information Report
Inventory – Items Profit Analysis Report					X	Reports > Inventory > Inventory – Items Profit Analysis Report
Inventory – Linked Items Report					X	Reports > Inventory > Inventory – Linked Items Report
Inventory – On Order Report					X	Reports > Inventory > Inventory – On Order Report
Inventory – Overstock Report					X	Reports > Inventory > Inventory – Overstock Report
Inventory – Partial Receipts Report					X	Reports > Inventory > Inventory – Partial Receipts Report
Inventory – Purchase History Report					X	Reports > Inventory > Inventory – Purchase History Report
Inventory – Receipt Report					X	Reports > Inventory > Inventory – Receipt Report
Inventory – Reorder Report					X	Reports > Inventory > Inventory – Reorder Report
Inventory – Returns Report					X	Reports > Inventory > Inventory – Returns Report
Inventory – Setup Error Report					X	Report will automatically display when an error occurs.
Inventory – Turnover Report					X	Reports > Inventory > Inventory – Inventory Turnover Report
Inventory – Usage Tax Report					X	Reports > Inventory > Inventory – Inventory Usage Tax Report
Inventory – Vendor Summary Report					X	Reports > Inventory > Inventory – Inventory Vendor Summary Report
Inventory – Want List Report					X	Reports > Inventory > Inventory – Want List Report
Invoice Group Item Setup Report	X		X	X	X	Reports > Invoice Item > Invoice Group Item Setup Report
Invoice Item Classification Setup Report					X	Reports > Invoice Item > Invoice Item Classification Setup Report
Invoice Item Dispensing Setup Report	X		X	X	X	Reports > Invoice Item > Invoice Item Dispensing Setup Report
Invoice Item Information Report					X	Reports > Invoice Item > Invoice Item Information Report
Invoice Item Price Information					X	Reports > Invoice Item > Invoice Item Price Information
Invoice Item Reminder Information Report					X	Reports > Invoice Item > Invoice Item Reminder Information Report

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	GEN	REC	DR	TECH	M/O	
Invoice Items Sales Information					X	Reports > Invoice Item > Invoice Items Sales Information
Invoice Item Setup Report					X	Reports > Invoice Item > Invoice Item Setup Report
Invoice Item Tax Setup Report					X	Reports > Invoice Item > Invoice Item Tax Setup Report
Invoice Receipt	X	X	X	X	X	Reports > Inventory > Inventory – Receipt Report
Invoices	X	X	X	X	X	Patient Clipboard > Select Client & Patient > Right-click Patient name > Select Invoice
Lab Cumulative Results Report	X	X	X	X	X	Reports > Lab > Lab Cumulative Results Report
Lab Detail Results Report	X	X	X	X	X	Reports> Lab > Lab Cumulative Results Report > Preview Detailed Report
Lab Item Price Update Error Report				X	X	Prints automatically when price update fails
Lab Request	X	X	X	X	X	Lab icon (Yellow Beaker) > Click New
Lab Request Label	X	X	X	X	X	Lab icon (Yellow Beaker) > Click New > Insert Lab Requested Criteria > OK
Lab Request Profiles Report	X	X	X	X	X	Reports > Lab > Lab Request Profiles Report
Lab Request Status Report	X	X	X	X	X	Reports > Lab > Lab Request Status Report
Lab Request Tube Label	X	X	X	X	X	Lab icon (Yellow Beaker) > Click New > Insert Lab Requested Criteria > OK
Lab Templates Report	X	X	X	X	X	Reports > Lab > Lab Templates Report
Lab Test Defaults Report	X	X	X	X	X	Reports > Lab > Lab Test Defaults Report
LabREXX Test Request Form	X	X	X	X	X	Lab icon (yellow beaker) > Click New > Insert Lab Requested Criteria for Reference Lab > Test List OR Activities > Lab Work > Create IDEXX LabREXX Test Request Form
Mailing Labels					X	Reports > Client > Mailing labels
Medical Notes	X	X	X	X	X	Patient Clipboard > Select Client/Patient > Highlight Patient Name > Click Print button
Merge Clients/Patients Report					X	Reports > Client > Merge Clients/Patients Reports
Microchip ID Report	X	X	X	X	X	Reports > Patient > Microchip ID Report
Partnership Report					X	Reports > Equine > Partnership Report
Patient Advisor – Diagnosis by Staff	X	X	X		X	Reports > Patient Advisor > Diagnosis by Staff
Patient Advisor – Diagnosis Count Report	X	X	X		X	Reports > Patient Advisor > Diagnosis Count Report
Patient Advisor – Diagnosis Code Report	X	X	X		X	Reports > Patient Advisor > Diagnosis Code Report
Patient Advisor – Instruction Templates Report	X		X		X	Reports > Patient Advisor > Diagnosis Instructions Template Report

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Foundation Reports Security	Access Suggestions GEN	REC	DR	TECH	M/O	Path to Locate
Patient Advisor – Observations Report	X		X		X	Reports > Patient Advisor > Observation Report
Patient Advisor – Open Physical Exam Report	X		X		X	Reports > Patient Advisor > Open Physical Exam Report
Patient Advisor – Patient Advisor System Setup Report	X		X		X	Reports > Patient Advisor > Patient Advisor System Setup Report
Patient Advisor – Patient Diagnosis Report	X	X	X	X	X	Reports > Patient Advisor > Patient Diagnosis Report
Patient Advisor – Patient Diagnosis Status Report	X	X	X	X	X	Reports > Patient Advisor > Patient Diagnosis Status Report
Patient Advisor – Pet Health Report Card	X	X	X	X	X	Patient Advisor icon > Complete Exam > Save or Post
Patient Advisor – Reminders by Diagnosis	X		X		X	Reports > Patient Advisor > Reminders by Diagnosis
Patient Advisor – System Template Setup Report					X	Reports > Patient Advisor > System Template Setup Report
Patient Advisor – Treatment Plan	X	X	X	X	X	Reports > Patient Advisor > Treatment Plan
Patient By Name Report					X	Reports > Patient > Patient By Name Report
Patient Diagnosis Report	X		X		X	Reports > Patient > Patient Diagnosis Report
Patient History Report	X	X	X	X	X	Reports > Patient > Patient History Report
Patient Prompts					X	Reports > Patient > Patient Prompts
Patient Visit List Report	X	X	X	X	X	Patient Visit List icon > Print OR Reports > Patient > Patient Visit List Report
Payment on Account	X	X	X	X	X	Reports > Client > Client Account History
Performance Tracker					X	Reports > Performance Tracker
Pharmacy – Client Information Sheet	X	X	X	X	X	Prescription icon > Select Drug > Pharmacy button
Pharmacy – Drug Information Sheet	X	X	X	X	X	Prescription icon > Select Drug > Pharmacy button
Physical Exam – Observations Report	X		X		X	Reports > Physical Exam > Observations Report
Physical Exam – Open Physical Exam Report	X		X		X	Reports > Physical Exam > Open Physical Exam Report
Physical Exam – Physical Exam System Setup Report	X		X		X	Reports > Physical Exam > Physical Exam System Setup Report
Physical Exam – System Template Setup Report					X	Reports > Physical Exam > System Template Setup Report
Pick Item Setup Report					X	Reports > Invoice Item > Pick Item Setup Report
Prescription History Report	X	X	X	X	X	Reports > Prescription > Prescription History Report
Prescription Instruction Report	X	X	X	X	X	Reports > Prescription > Prescription Instruction Reports

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Foundation Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Prescription Labels	X	X	X	X	X	Activities > Prescription Label
Prescription Refill Log	X	X	X	X	X	Reports > Prescription > Prescription Refill Log
Problem List Setup Report	X	X	X	X	X	Reports > Practice > Problem List Setup Report
Purge Detail Report					X	Reports > Practice > Purge Report
Purge Report					X	Reports > Practice > Purge Report
Rabies Certificate (Default)	X	X	X	X	X	Lists > Species > Select Species > Rabies Default
Rabies Tags Report	X	X	X	X	X	Reports > Patient > Rabies Tag Report
Radiology (Imaging) Log	X	X	X	X	X	Reports > Practice > Radiology (Imaging) Log
Referral Doctor Master Report					X	Reports > Referral > Referral Doctor Master Report
Referral Hospital Master Report					X	Reports > Referral > Referral Hospital Master Report
Referral Report					X	Reports > Client > Referral Report
Reminder Letter Report	X	X		X	X	Reports > Patient > Reminder Letter Report
Reminder Recall Report	X	X	X	X	X	Reports > Patient > Reminder Recall Report
Reminder Report	X	X		X	X	Reports > Patient > Reminder Report
Reminders	X	X	X	X	X	Activities > Reminders
Report Writer – Labels	X	X	X	X	X	Reports > Client and Patient Report Builder
Report Writer – Report	X	X	X	X	X	Reports > Client and Patient Report Builder
Staff Class Commission Percentage Report					X	Reports > Staff > Staff Class Commission Percentage Report
Staff Commission Percentage Report					X	Reports > Staff > Staff Commission Percentage Report
Staff Defined Prompts Report					X	Reports > Staff > Staff Defined Prompts Report
Staff Phone List					X	Reports > Staff > Staff Phone List
Staff Summary Report					X	Reports > Staff > Staff Summary Report
Surgery/Anesthesia Log	X	X	X	X	X	Reports > Practice > Surgery/Anesthesia Log
Tentative Medical Note Report	X	X	X	X	X	Reports > Patient > Tentative Medical Note Report
Trainer Reminder Letter Report	X	X		X	X	Reports > Equine > Trainer Reminder Letter Report
Trainer Reminder Recall Report	X	X	X	X	X	Reports > Equine > Trainer Reminder Recall Report
Trainer Reminder Report	X	X			X	Reports > Equine > Trainer Reminder Report
Trainer Report					X	Reports > Equine > Trainer Report
Travel Sheets	X	X	X	X	X	Lists > Travel Sheets
Treatment Report	X	X	X	X	X	Reports > Equine > Treatment Report
Vaccine Tag Report	X	X	X	X	X	Reports > Patient > Vaccine Tag Report
Voided Documents					X	Reports > Patient > Voided Documents
Voided Invoices Report					X	Reports > Client > Voided Invoice Report

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	GEN	REC	DR	TECH	M/O	
Whiteboard Patient Orders Report	X	X	X	X	X	Reports > Patient > Whiteboard Patient Orders Report
Whiteboard Patient Treatments	X		X	X	X	Reports > Patient > Whiteboard Patient Treatments

Practice Explorer Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Batch Mode					X	File > Run Batch Reports
Change Password					X	Security > Change Password
Export					X	File > Open > Export
Import					X	File > Open > Import
Practice Explorer Preferences					X	File > Preferences
Reports					X	File > New > Report > Open > Canned Reports
Tallies					X	File > New > Tally
Updates					X	File > New > Update

Time Clock Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Access All Employees					X	Activities > Time Sheet
Change Password					X	File > Change Password
Data Defaults					X	Activities > Data Defaults
Edit Times					X	Activities > Edit Time
Report Selection					X	Reports > Report Selection
Sick Hours					X	Activities > Sick Hours
Staff List					X	Reports > Report Selection
User Information					X	File > User Information
Vacation Hours					X	Activities > Vacation Hours

Time Clock Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Staff Hours Report					X	Reports > Report Selection

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